# SCHEDULE SOURCE

**ScheduleSource TeamWork
Location Portal Guides
Part I Core Scheduling Package**

**Version 1.0**

# Table of Contents

# Location Portal Guides

## Introduction

This series of guides helps you learn how to use the Location portal in TeamWork. Once locations, employees, stations, users, and roles are entered in the Enterprise portal, you can use these records in the Location portal. Build templates and schedules to assign your workforce and manage schedule churn. Optimize filling shifts in your schedules using Auto Fill. Communicate with employees through Collaboration features. Manage employee leave and maintain station skills and availability for scheduling.

Because TeamWork allows your organization to use only those features that are beneficial in your company, we have separated documentation into several help systems to match system features. They are:

- **Part I Core Scheduling Package** — includes help for the Location portal sections that are included in the Core Scheduling subscription. It provides information for using TeamWork records that were entered in the Enterprise portal. You use these records in the Location portal, edit them as needed, and ensure they meet the requirements of each location. Then, when you build schedules, you can manage your workforce through employees' use of the Employee portal.

- **Part II Additional Modules** — includes help for additional TeamWork modules that can be purchased to add to the Core Scheduling Package. These assist with specific organization needs. They include: Time & Attendance, Credentials, Policy Management, Forecasts, Tours, and Recruiting.

While Part I Core Scheduling Package contents are complete, work continues on Part II Additional Modules. Updates are added as they become available.

# Chapter 1 – Overview of Core Scheduling Package

Use this help guide to learn how Core Scheduling in the Location portal works in TeamWork. The Location portal provides you with powerful tools that help you schedule your workforce, fill shifts at stations in your locations, maintain current employee data, manage employee availability and leave, and use collaboration features to communicate with employees.

Contents for this help system include:

- Introduction — overview of TeamWork and the Location portal functions. See Overview of TeamWork and Location Portal Workflow. To familiarize yourself with how the Location portal is organized and designed to operate, see Getting Started. To receive additional help, see ScheduleSource Support.

- Understanding the Location Portal — description of Location portal role definitions that give users access privileges. Also includes menu selections and a description of each window that launches when you click on a menu selection. See Understanding the Location Portal.

- How To's for Setting Up the Location Portal — step-by-step procedures for setting up the Location portal. This includes configuring location settings and lists, reviewing and adding to location information, downloading setup and scheduling data, establishing employee access, setting up swap board rules, and checking employee and user passwords. See How To's for Setting Up the Location Portal.

- How To's for Managing Stations and Employees — step-by-step procedures for adding, maintaining, and using station-related and employee-specific data. While both station and employee records are initially established in the Enterprise portal, many organizations maintain these records in the Location portal. See How To's for Managing Stations and Employees.

- How To's for Building and Managing Schedules— step-by-step procedures for scheduling your workforce. It includes creating templates with frequently worked shifts at the station level, using these templates to build schedules, and using Auto Fill to fill shifts with your employees. It also includes forecasting requirements and building a headcount plan to use in developing a template and schedule. See How To's for Building and Managing Schedules.

- 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 and creating feedback surveys. See Collaboration Section 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 Section Overview.

# Overview of TeamWork

ScheduleSource TeamWork is an application that helps you manage your company workforce. It includes three portals: Enterprise, Location, and Employee. 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's function 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 and schedules with shifts to fill with your employees, manage schedule churn, and communicate with employees. Schedule work in stations and assign employees skill levels at 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.
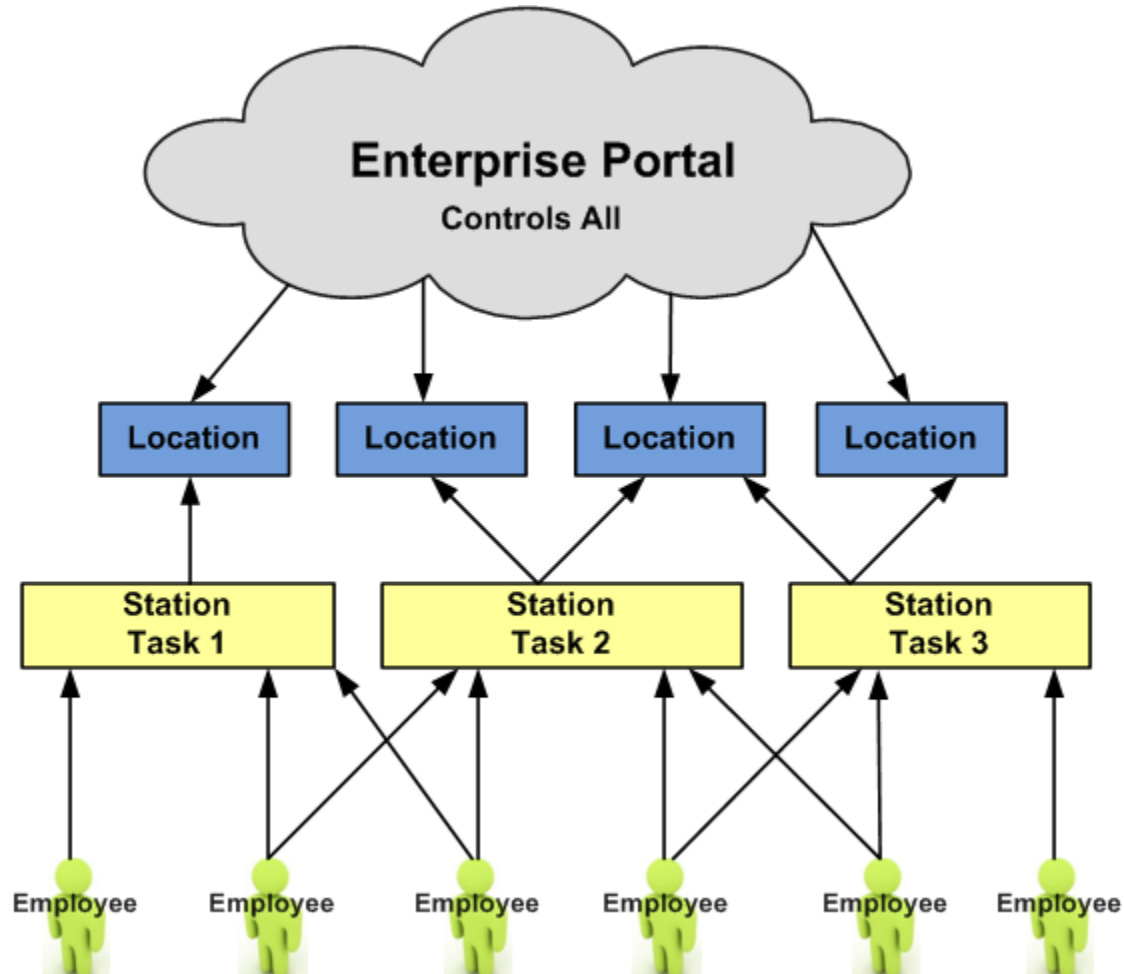


# Location Portal Workflow

The Location portal provides you with the ability to schedule employees to work shifts at the stations in your location. Use it to build templates and shifts that help you assign employees and manage coverage, while enforcing employee scheduling parameters. Once locations, stations, and employees are entered in the Enterprise portal, you can use the data in the Location portal to:

- Schedule shifts and use the optimizer Auto Fill to assign them to employees

- Establish location settings for week days and special days

- Group employees into crews and shift groups to filter your scheduled shifts. Define labor pools to use in filling the shifts in your schedule.

- Edit location information and download data and schedules.

- Define employee access privileges for scheduling, contact info, and approvals.

- Establish Swap Board Rules including settings, approvals, and scheduling constraints.

- Edit stations where employees work and assign a priority or skill level and pay rate.

- View status of stations in terms of the number of employees who have required skills and an employee's relative priority for assignment.

- View employee personal information, contact details, and scheduling requirements and limitations.

- Rank employees relative to internal organization rankings.

- Enter availability and scheduling restrictions for each employee and then view them for all employees or an individual employee.

- Grant or deny specific employee leave requests.

- Use Collaboration features to post events to an organization calendar, create and distribute messages and alerts to the message board, set up email notifications, and build surveys to distribute to employees using the feedback loop.

- Design reports for your location and run fixed reports as well as those created in the Enterprise portal and shared with locations.

Once schedulers develop schedules and assign employees to shifts, employees use the Employee portal to review assignments, manage leave requests, swap shift assignments, and monitor messages and announcements. For more information on how tasks are performed between portals, refer to Overview of TeamWork.

# Suggested Location Portal Workflow

There are dual data entry options for Location, Station, and Employee data. This means that many of the windows in both the Enterprise portal and the Location portal contain the same fields, and information can be entered in either portal. In addition, it means that information entered in one portal populates the identical field in the other portal. To begin with, however, the Enterprise portal establishes records for Locations, Stations, and Employees and must assign them to the Location so you can use them.

The Enterprise portal also assigns User role privileges. What each user can see and do in the Location portal is defined by the roles granted. You can review the role privileges assigned to your user login under Features in the My Settings window. See My Settings Information.

It may be helpful to refer to Getting Started and Overview of TeamWork for general instructions on using the Location portal.

For How To's that address each of the following workflow steps, refer to: How To's for Setting Up the Location Portal, How Tos for Managing Stations and Employees, and How Tos for Using the Location Portal.

# Workflow Steps

A suggested workflow for using the Location Portal is as follows:

**1. Locations – Define Week Days, Special Days, and Lists**

- Define First Day, Rank, Work Days, and Time
- Establish Crews, Labor Pools, and Shift Groups as needed

**2. Admin – Configure Location Info and Privileges**

- Configure Info and Download Location-specific Data
- Establish Privileges for Employee Access and Swap Board
- Check Passwords for Employees and Users

**3. Employees – Edit and Add to Employee Information**

- Assign Employees a priority rank at Stations
- Enter Employee Scheduling Parameters and pay rate
- Enter Employee availability, allow/disallow swap privileges

**4. Stations – Edit and Add to Station Information**

- Enter Station Priority and Pay Rate
- Review Employee Priority Assignments
- Allow/Disallow Swap

**5. Templates – Create Templates to Build Schedules**

**6. Schedules – Build, Edit, and Manage Weekly Schedules**

## See Also Additional Location Portal Functionality

- When and how should I use Collaboration? See Collaboration and Collaboration Section Overview.

- Should I use Forecasts? See Forecasts and Forecasts Section Overview.

- When is it helpful to use Templates? See Templates and Templates Section Overview.

- Can I run Reports? Can I use Enterprise reports and Location reports to help me make decisions? See Reports and Reports Section Overview.

# Getting Started

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

- Signing In

- Navigating TeamWork

- Using Shortcuts

- Logging in to Multiple Portals

- Managing Employees

## Signing In

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

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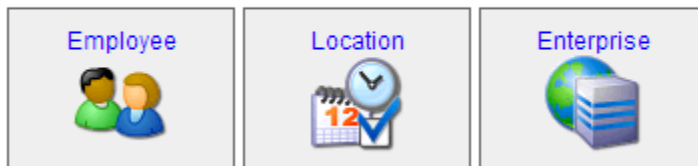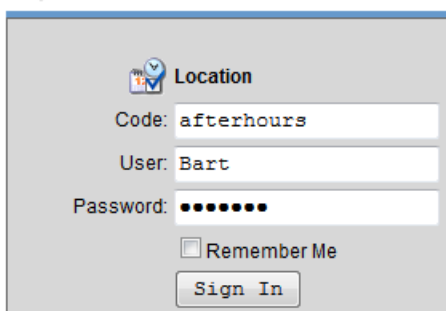


2. Click on **Location**.
   Sign In page displays.

**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**. Select the check box to **Remember Me** if you want the computer you are working on to remember your account code and user name.
**Note:** If you select the check box to Remember Me, you must still enter your password in the future log-ins.

4. Click **Sign In**. The following Home Page displays.
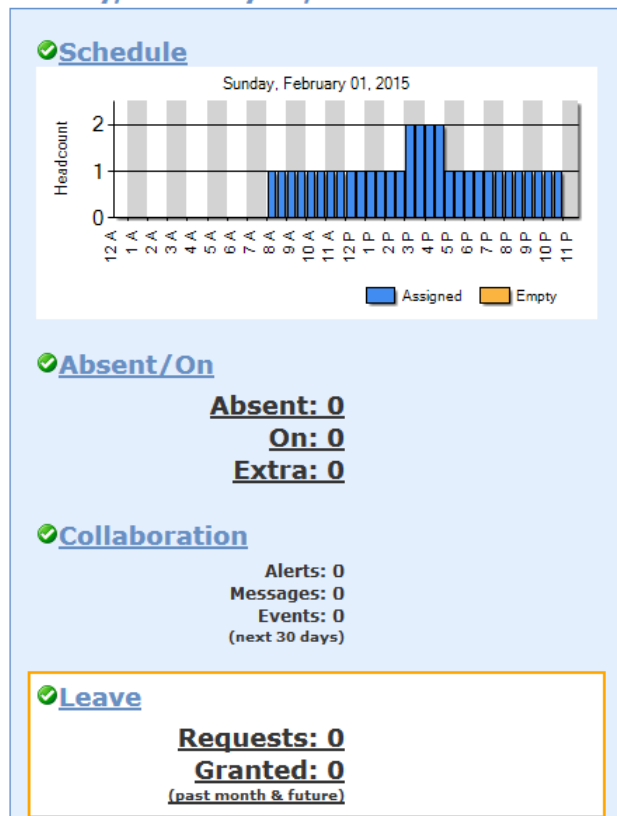
5. To begin working, click on a top menu selection and the section displays.
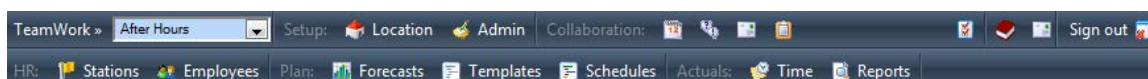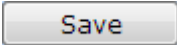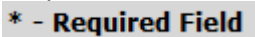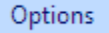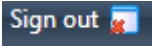


**Note:** After you select a section, each window displays a left and right pane. A navigation toolbar displays in each pane. The sections that are visible in your account are controlled by your organization and the role privileges you are assigned.

# Navigating TeamWork

Each of the sections in the Location 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 on a folder under the Menu tab to expand the list. For example, in Employee the  folder lists available tools: <br><br>• Click Options to set your Menu Display for the way to display your Menu list.<br><br>• Click Refresh so that data you enter and save in the right pane is visible in lists on the left pane.<br>**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<br><br>Includes the same icon and name as displays on the top menu link<br><br>Additional toolbar selections may 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.<br><br>• Underlined titles indicate an active link. For example,  launches an Employees window.<br><br>• Dark blue titles may launch a window or provide additional drop-down selections. Employees includes Personal, Contact, and Scheduling.<br><br>• Gray titles are the group name and are not active. For example, the following toolbar  indicates that Collaboration includes several links, indicated by the icons listed. |

| Save button:<br>Save | You must click the **Save** button after entering information. If you do not, your work is NOT SAVED. |
|---|---|
| Required Field:<br>**\* - 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<br>Print | • Click Print to open your printer screen or print from the Browser (CTRL P).<br>• Use Preview or Browser commands to resize and format a page before printing. |
| Use Filters to Increase Efficiency<br>How they work | • Options tabs - use Option tab filters to display part of the data more quickly<br>• Reports - Create and Save custom filters to quickly view frequently used data subsets<br>• 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<br>Pulling latest data | • Click on TeamWork » in the left corner of the top menu by your Location name to return to your Home page.<br>• Clicking on TeamWork » also pulls the newest data from the TeamWork 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<br>Sign out | Click the Sign out icon to sign out of the Location portal. Always use Sign out to end your session. Do not just close the browser. |

# Using Shortcuts

The Location 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 FireFox for the Location portal, Chrome for the Enterprise portal, and Internet Explorer for the Employee portal.

# Managing Employees

You establish employee initial records in TeamWork using the Enterprise portal. Once in the system, you can add to or edit most of the employee data in the Location portal. In addition, you can delete or make an employee inactive in your location. If you desire to do so on an Enterprise level, those changes must be made in the Enterprise portal. Refer to the following.

- **Delete** - when you delete an employee from the Location portal, they are deleted from your location. All data on the employee is not visible to you in the location.
  **Note:** Employees cannot be deleted if they are in active (non-archived) shifts or have time data at your location.

- **Inactive** - when you make an employee inactive from the Location portal, the employee is inactive in your location. The employee may still be active in another location. You can re-activate the employee at any time.

**Remember:** 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.
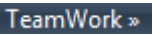
# My Settings Information

Use the My Settings window to display and edit your user information. It includes:

- **Information** — a summary of settings related to your user account. You can make changes to your name, email, support notifications, default crew, culture, custom date and time format, and password.

  **Note:** You cannot change the Code you use when you sign in, the User name you use to sign in, or the locations you are assigned to. These changes must be made by an administrator in the Enterprise portal.

- **Features** — a list of the user role privileges you are assigned, as set in the Roles section in the Enterprise portal. You cannot edit this list in the Location portal. Changes must be made by an administrator in the Enterprise portal. See Location Portal Role Definitions for Part I Core Scheduling Package.

For an example of this window, see Start and My Settings.

**To display and edit My Settings:**

1. Click on the TeamWork logo ▐ TeamWork » ▌ on the top menu or click My Settings icon  .
   My Setting Information and Features window displays.

2. Verify your **First Name** and **Last Name**. You can edit these fields if allowed by your organization.

3. Enter your **Email** address. Having an accurate email address ensures you receive email notifications when they are sent.

4. Select **Yes** so you will receive important notification emails from ScheduleSource support.

5. If desired, select your **Default Crew** 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 you log in to this location.

7. If desired, add a custom date format and/or custom time format. Leave blank for U.S. time format.

8. If desired, click [Change] to change your password.
   Change Password pop-up window displays. Enter your New Password, repeat the entry, and click **Save**.
   **Note:** A strong password is 8 or more characters, containing both letters and numbers, and is not a variation of your User name.

9. Click **Save**.

# 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 Location 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. See My Settings Information.

6. Click **Submit Case**.
   ScheduleSource will respond by email.

# Using the TeamWork Learning Center

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

## User Guides

Full documentation, by portal, available online or as a PDF.

- Enterprise Portal
- Location Portal

## Release Notes

Information and self-guided training documents for new releases. Release Notes are sorted by newest releases.

## Help Cards

One to two-page PDFs with help focused on a single topic.

## 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 Location Portal

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

- Location Portal Role Definition for Part I Core Scheduling Package
- Menu Selections and Windows

## Location Portal Role Definitions for Part I Core Scheduling Package

The following Role settings apply in the Location portal. There are eight role sections that contain role actions and related permissions. Roles are established and assigned to Location users in the Enterprise portal. When you log into the Location portal, your role assignment determines the sections that display and the actions you can perform.

**Note:** If your organization uses additional modules, those modules may include additional role definitions that are not addressed in the following tables. For example, there are roles related to Time & Attendance and Tours, but they are not listed in the following.

### Admin Section Access

| Action | Permission description... |
|--------|---------------------------|
| Admin | provides full access to the Admin section with full ability to add, edit, or delete data |

### Collaboration Section Access

| Action | Permission description... |
|--------|---------------------------|
| Feedback Administrator | when Full role below is enabled, adds the ability/link to add a new survey |
| Full | provides full access to the Collaboration section for events, messages, and notifications. Provides access to the Feedback menu to edit/manage results of an existing survey, but cannot add a new survey. See Feedback Administrator Collaboration role setting listed previously. |

# Employees Section Access

| Action | Permission description... |
| --- | --- |
| Manage Rotations | allows the addition, editing, assigning employees and deletion of rotations |
| View | allows viewing of the Employees section data; no editing |
| Edit Personal Info | allows editing the personal information of employees on the Info screen |
| Edit Contact Info | allows editing of the contact information on the Info screen |
| Change Password | allows changing the password of an employee |
| Edit Crew | allows assigning an employee to a crew |
| Edit Schedule Settings | allows editing the scheduling settings for employees |
| Edit Swap Settings | allows editing the ability of an employee to access the swap board |
| Edit Note | allows editing the note field on the employee Info page |
| View and Edit PayRates | allows full access to the employee pay rate field |
| Inactivate | allows for the inactivation or reactivation of an employee |
| Delete | allows for the deletion of the employee from the location, but not the enterprise |
| View Leave | allows view-only of employee leave requests and status, no management ability |
| Edit Leave | allows adding, editing, and managing employee leave requests |
| Mass-Update Information | allows access to the Mass Update link in the left menu |
| View Availability | allows employee availability settings to be viewed; no editing |
| Edit Availability | allows employee availability settings to be added, edited or deleted |
| View Only Default Employees | **RESTRICTS** view access. Limits employee list at the location so that only employees with that location as the default are listed. |

# Forecasting Section Access

| Action | Permission description... |
|---|---|
| Full | allows full access to the forecasting section |

# Locations Section Access

| Action | Permission description... |
|---|---|
| View | allows viewing of the Locations section data; no editing |
| View Weekdays | allows viewing Weekdays data; no editing |
| Manage Crews | allows full access to crew data |
| Manage Labor Pools | allows full access to labor pools data |
| Manage Special Days | allows full access to special days (including holiday entry) |
| Manage ShiftGroups | allows full access to shift group data |
| Edit Weekdays | allows full access to the week day data |

# Reports Section Access

| Action | Permission description... |
|---|---|
| Full | allows full access to the reports section |

# Schedule Section Access

| Action | Permission description... |
|---|---|
| View | allows viewing of the Schedule section data – no editing |
| Add Schedule | allows adding a schedule |
| Edit Schedule | allows editing a schedule |
| Publish Schedule | allows ability to publish a schedule so visible in employee portal |

| Action | Permission description... |
|---|---|
| Approve Schedule | allows ability to approve the schedule as completed status |
| Delete Schedule | allows the deletion of a schedule |
| Archive Schedule | allows the archiving of a schedule |
| Edit Schedule Settings | allows editing the schedule settings from the Schedule Settings link |
| Add Shift | allows a shift to be added |
| Edit Shift | allows a shift to be edited |
| Assign Employees to Shift | allows an employee to be assigned to a shift |
| Override Conflict/Availability | allows for ignoring the availability conflict when assigning shifts |
| Delete Shift | allows a shift to be deleted |
| Run Auto Fill | allows access to the Auto Fill engine for automatic assignment of shifts |
| Merge Shifts | allows back to back shifts at the same station to be merged |
| Split Shifts | allows shifts to be split |
| Mass-Update | allows access to the mass update functionality for editing shifts |
| Mass-Assign | allows access to the mass assigning of shifts to an employee |
| Add from Tour | allows schedules to be built from tours that are defined |
| Add from Templates | allows schedules to be built from templates that are defined |
| Add from Schedules | allows schedules to be built from schedules that are already built |
| Auto Create Breaks | allows the auto creation of breaks within a set of shifts |
| View Swapboard | allows view-only of the swapboard shifts |
| Approve Swap | allows the approval of swaps if the Swap Approval box is checked in the Admin section |
| Post to Swapboard | allows ability to post a shift for an employee to the swapboard |
| Coverage Report | allows access to the coverage report in the Schedules section |

| Action | Permission description... |
|---|---|
| Totals Report | allows access to the totals report in the Schedules section |
| Over/Under Report | allows access to the over/under report in the Schedules section |
| Tours | allows access to the Tours section on the main menu |
| View BidBoards | allows view-only of Bid Boards that have been created. Must also have role permission enabled to View Swapboard. |
| Post Shifts to BidBoard | allows selecting shifts to post to Bid Board and viewing only employee bids entered. Must also have role permission to Assign Employee to Shift. |
| Award Shifts on BidBoard | allows awarding shifts on the Bid Board to available employees |
| Manage BidBoards | allows adding, deleting, and editing settings on Bid Board |

## Stations Section Access

| Action | Permission description... |
|---|---|
| View | allows viewing of the stations section data; no editing |
| Edit | allows full editing of the stations section data |

## Templates Section Access

| Action | Permission description... |
|---|---|
| Full | allows full access of the templates section data to create, delete, and edit |

## Time Section Access

| Action | Permission description... |
|---|---|
| View Pay Rates | adds pay rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Pay Rate for the time entry |
| View Bill Rates | adds bill rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Bill Rate for the time entry |

# 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 Location portal.

## Menu Selections

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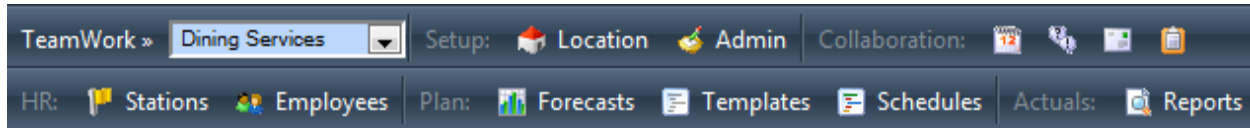


**Note:** Use the drop-down menu next to TeamWork to change from one location to another. However, Location portal users only have access to the locations they are assigned to from the Enterprise portal.

## Left Navigation

In each section, the two critical components in the left navigation are Menu and Options tabs. 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 location-related data.

### Options

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

## Links to Location Portal Sections

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

- Start and My Settings

- Location

- Admin

- Collaboration

- Stations

- Employees

- [Forecasts](#)
- [Templates](#)
- [Schedules](#)
- [Reports](#)

# Start and My Settings

When you log in to the Location portal, the Start window displays summary information regarding your location and employee schedules, as well as absences, collaboration, and leave. To see a detailed window that shows specific information in each category, click on the underlined title. A window displays in the right pane and lists detailed data. When you use the drop-down list to change from the location you logged in to and select another location, the Start window of that new location displays.

From this window, you can also use the My Settings link and make changes to your user account information. See [My Settings Information](#).

## Launch Start Window

## My Settings Window



## See Also

For a How To using the Start and My Settings window, see My Settings Information.

# Location

When you click on the Location section, the Location window displays. Locations can be physical buildings or departments that your organization wants to create and manage separate schedules for. Locations must be set up in the Enterprise portal for you to be able to use them in the Location portal. In addition, the Enterprise portal must assign users, stations, and employees to your specific location in order for you to use the data in the Location portal.

When you log in to the Location portal, you log into a specific location. But once you are logged in to one location, you can use the drop-down list of locations you are assigned to and change from one location to another location.

While location settings for week days and special days can be entered in the Enterprise portal, you can also enter them in the Location portal depending on your role permissions. Role permissions may include

viewing location information, editing weekdays, and managing special days. From this window, you can select the first day of the week and rank a day's importance for scheduling. Work day start time and end time are not applicable, so leave them blank.

Crews, labor pools, and shift groups are Location-specific lists that can be created. Crews and shift groups create filters to view the schedule by a specific group of employees or shifts. Labor pools can be used to Auto Fill a schedule with a specific pool of employees first.

See Understanding Location Portal Role Definitions for Locations Section Access.

# Launch Location



# Settings Window for Week Days

## Settings Window for Special Days

| From | To | Name | Type | Leave Blackout | Delete |
|---|---|---|---|---|---|
| 8/17/2014 | 8/19/2014 | Orientation | No Schedule | Yes | |
| 8/25/2014 | 8/25/2014 | Labor Day | No Schedule | Yes | x |
| 12/19/2014 | 1/1/2015 | Christmas Vacation | Allow Schedule | | |
| 3/22/2015 | 3/28/2015 | Easter/Spring Break | Spring Break | | |

**Special Days:**

[Add]

**Location     Print**

## Lists Window for Crews

**Location     Print**

**Crews:**

New Crew: [          ]    Add

| Name | Employees | Delete |
|---|---|---|
| Full time | 6 | x |
| International Students | 3 | x |
| Part time | 5 | x |

## Lists Window for Labor Pools

**Location     Print**
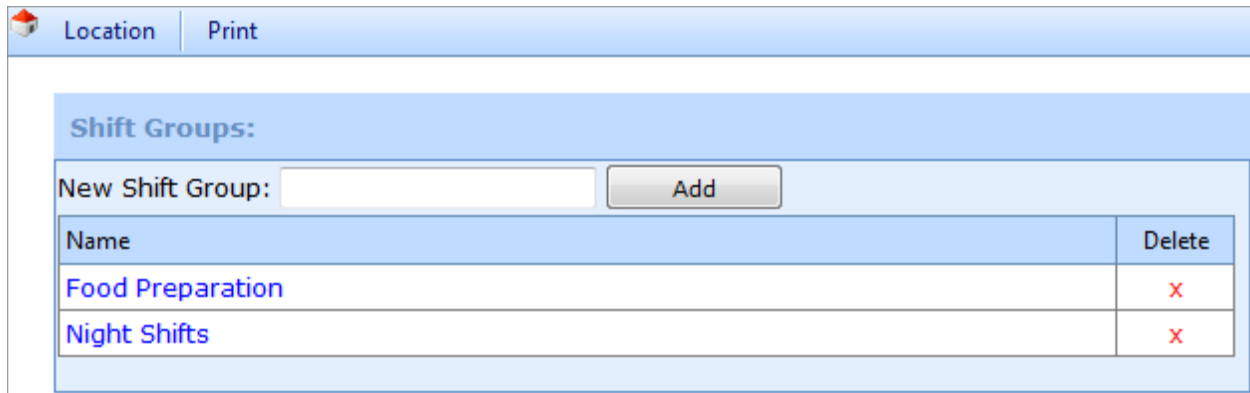
**Labor Pools:**

New Labor Pool: [          ]    Add

| Name | Start | End | Volunteer | Employees | Delete |
|---|---|---|---|---|---|
| Full time | | | No | 2 | x |

## Lists Window for Shift Groups



## See Also

For How To's on using the Locations section, see Setting Up Location Week Days and Special Days and Setting Up Crews, Labor Pools, and Shift Groups.

## Admin
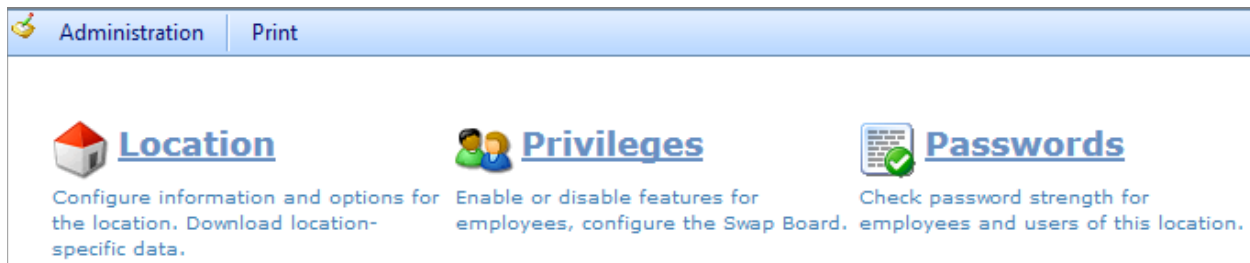
When you click on the Admin section, the Admin window displays. From this window, you can edit location information, assign a Globally Unique ID (optional), and download a variety of setup and scheduling data as well as employee information. In addition, you can set up or edit privileges involving employee access and swap board rules. Lastly, you can check on employee and user passwords.

The Enterprise portal creates locations. You may be allowed to enter the address information and time zone. You cannot edit the fields in the Enterprise section.

While employee access and swap board rules can be established in the Enterprise portal, you can edit them in the Location portal for each location and make sure they are appropriate for that location. These are location-specific and can be set differently by different locations.

Admin settings can be controlled in the Location portal if allowed by User roles. See Understanding Location Portal Role Definitions for Admin Section Access.

## Launch Admin

## Location Information



## Unique ID

## Downloads



## Privileges Window for Employee Access

## Privileges Window for Swap Board Rules



## Check Employee Passwords



## Check User Passwords



## See Also

For How To's on using the Admin section, see Setting Up Admin Information for a Location.

# 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.

**Note:** To build a survey, your role permissions must be enabled for both Full and Feedback Administrator.

## Launch Calendar

| Collaboration | Events | Messages | Notify | Feedback | Print |
|---|---|---|---|---|---|

| Events | Calendar | List | Add Event |
|---|---|---|---|

| | | today ▾ | | April, 2015 | |
|---|---|---|---|---|---|
| **Monday** | | **Tuesday** | | **Wednesday** | |
| 30 | | 31 | | 01 Apr | |
| 6 | | 7 | | 8 | |
| 13 | | 14 | | 15 | |
| 20 | | 21 | | 22 | |
| 27 | | 28 | | 29 | |

## Launch Messages

| Collaboration | Events | Messages | Notify | Feedback | Print |
|---|---|---|---|---|---|

| Messages | List | Add Message | Monitor |
|---|---|---|---|

Recent | All | **Active Messages = 1**

| Title: | Replies: | From: |
|---|---|---|
| **Alerts:** | | |
| Meeting Every Monday until Labor Day | 0 | Olsen, Max |
| **Messages:** | | |
| | | |
| **Your Pending:** | | |
| **Your Hidden or Expired:** | | |

## Launch Notifications



## Launch Surveys



## See Also

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

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

# Stations

When you click on the Stations link, the Stations window displays. Stations are the distinct work areas or jobs within a location. They must be set up in the Enterprise portal for you to be able to use them in the Location portal. Your role permissions may include viewing station information or editing it.

## Launch Stations



## Display Stations Summary Information



## Edit Stations

## Stations Status



## Employees Assigned to a Station



## See Also

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

# Employees

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

Employees must be set up in the Enterprise portal and assigned to the location for you to be able to use them for scheduling in the Location portal. Your role permissions may include viewing employee information as well as editing many different aspects of employee data.

Personal and contact information is collected and displays in the Edit Employee 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 > Employee Access.

Understanding the Location Portal | 31

## Launch Employees



## Employees Summary Information



## Edit Employee

## Employee Status



## Employee Stations



## Employee Availability

## Employee Leave

| From | To | Days | Time(s) | Type | Comment | Conflicts | Hours | Status | Requested | Delete |
|---|---|---|---|---|---|---|---|---|---|---|
| Apr 20 (Mon) | Apr 26 (Sun) | 7 | | Vacation | | 0 | 56.00 | **REQUESTED** Grant \| Deny | Monday, April 20, 2015 11:35:47 AM | ☐ |

Employees \ Apple, Allison    Print
Edit    Status    Stations    Availability    Leave

**Leave Entries for: Apple, Allison**

➕Add Leave Request

◀ ▶ Today ▾    2015    Year

Select All    Delete

## View Availability

Employees    Print

**View Availability**
Week: 04/20/2015    Load    ◀ ▶    View: Week | Day | Heads ⓘ

| Employee | Crew | Start | Inactive | Mon 04/20/15 | Tue 04/21/15 | Wed 04/22/15 | Thu 04/23/15 | Fri 04/24/15 | Sat 04/25/15 | Sun 04/26/15 |
|---|---|---|---|---|---|---|---|---|---|---|
| **[Active]** | | | | | | | | | | |
| Apple, Allison | Part time | 8/1/09 | | -; Local | -; Local | -; Local | -; Local | -; Local | -; Local | -; Local |
| Berry, Barbara | Full time | 8/1/10 | | 11:00AM-11:00PM; Local | 11:00AM-11:00PM; Local | 11:00AM-11:00PM; Local | 11:00AM-11:00PM; Local | 11:00AM-11:00PM; Local | 11:00AM-11:00PM; Local | 11:00AM-11:00PM; Local |
| Cloud, Casey | Full time | 9/4/09 | | 6:00AM-3:00PM; Local | 12:00PM-11:30PM; Local | 6:00AM-3:00PM; Local | 12:00PM-11:30PM; Local | 12:00PM-11:30PM; Local | 12:00PM-11:30PM; Local | **OFF** Local |
| Door, Dave | Full time | 8/7/11 | | 5:00PM-11:00PM; Local | 5:00PM-11:00PM; Local | 5:00PM-11:00PM; Local | 5:00PM-11:00PM; Local | 5:00PM-11:00PM; Local | 1:00PM-11:30PM; Local | 10:00AM-11:30PM; Local |
| Evergreen, Erik | International Students | 5/31/10 | | 6:00AM-12:00PM; 5:00PM-11:00PM; Global | 6:00AM-12:00PM; 5:00PM-11:00PM; Global | 6:00AM-12:00PM; 5:00PM-11:00PM; Global | 6:00AM-12:00PM; Global | **OFF** Global | **OFF** Global | **OFF** Global |

## See Also

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

# Forecasts

When you click on the Forecasts link, the Forecasts window displays a link for Headcount Plans. Tools are built into the system for creating a Generic (7-Day) and Date-Based Local Plans for your location and plans shared by the Enterprise portal.

## Launch Forecasts
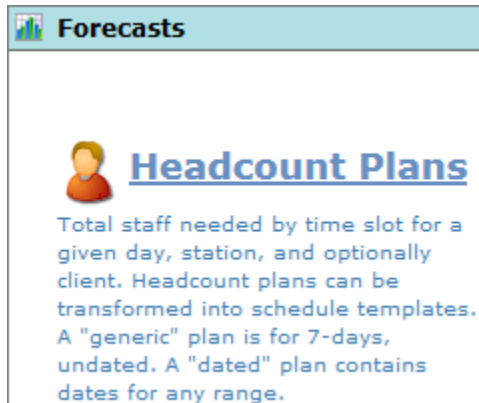


## Add Staff Plan



## See Also

For a How To using the Forecasts section, see Forecasts Section Overview.

# Templates

When you click on the Templates link, the Templates window displays two links: Templates and Shifts. This section of the Location portal allows you to create sets of shifts that you can fill with employees on a weekly basis. When you use templates and add shifts you need filled, you can quickly build a schedule that includes those shifts.

Templates that are created in the Enterprise portal are sometimes made available for use in locations. While the original template can only be edited in the Enterprise portal, you can use those templates to add shifts to a schedule in the Location portal, and can make changes to those shifts when they are in your schedule.

## Launch Templates



## Add Template

# Add Shifts



# See Also

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

# Schedules

When you click on the Schedules link, the Schedules window displays two links: Schedules and Shifts. Schedules contain a set of shifts that employees work in at each station in the location. In addition to adding, viewing, and archiving schedules, the left menu contains a Tools folder with a variety of tasks you can accomplish using these links.
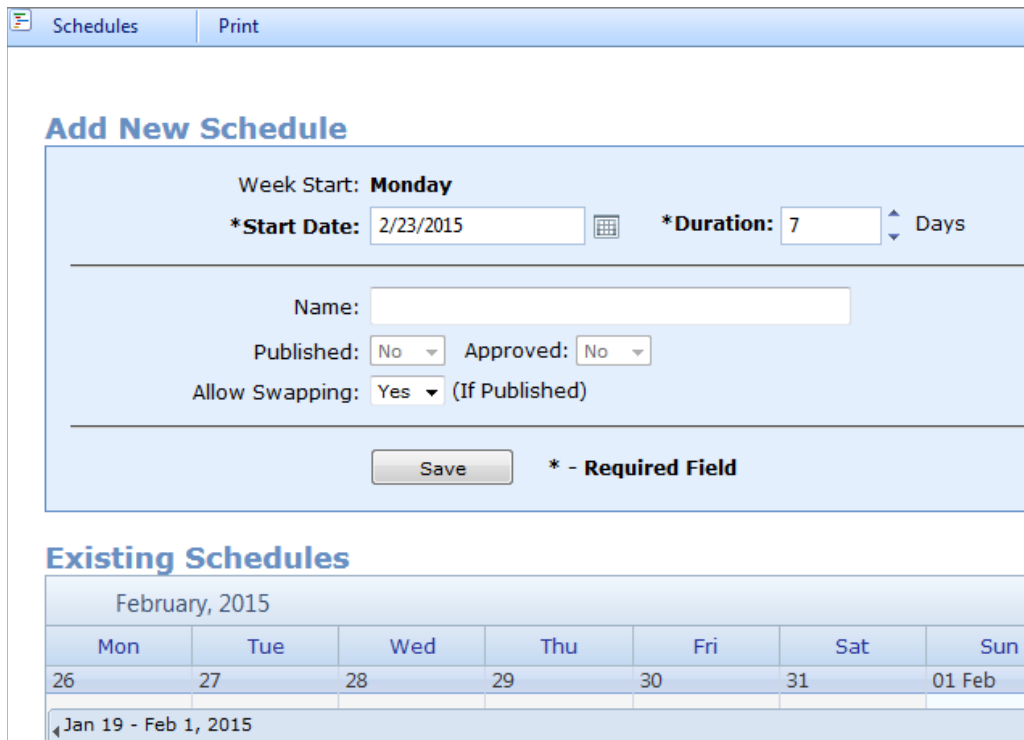
There are many role privileges associated with Schedules, and many involve various aspects of working with the actual schedules and shifts themselves. In addition, role privileges involve working with the Bid Boards and Swap Board. Using Tools selections, you can analyze coverage as well as costs and variance. You can even use tools to replace an employee in all shifts between two date ranges, across multiple schedules that have been built.

## Launch Schedules



## Add New Schedule

## Add Shifts



## Schedule Settings

## Schedules Summary

| | | | | | | |
|---|---|---|---|---|---|---|
| **Schedules** | **Print** | | | | | |

**Active** | **Archived**

| Start | End | Name | Shifts | Hours | Actions | |
|---|---|---|---|---|---|---|
| 1/19/2015 (Mon) | 2/1/2015 (Sun) | Jan 19 - Feb 1, 2015 | 14 | 91.00 | Archive | Delete |
| 2/2/2015 (Mon) | 2/8/2015 (Sun) | Feb 2 - Feb 8 | 6 | 37.00 | Archive | Delete |
| 2/9/2015 (Mon) | 2/15/2015 (Sun) | Feb 9 - Feb 15 | 6 | 37.00 | Archive | Delete |
| 2/16/2015 (Mon) | 2/22/2015 (Sun) | 2015 Feb Inventory | 66 | 198.00 | Archive | Delete |

## See Also

For a How To using the Schedules section, see Setting Up and Managing Schedules.

## 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. You can view fixed reports. You can use the Design feature to create your own reports, choosing the columns for data you want included. Filters are applicable to all reports.

## Reports Menu Selections

| **Reports** | **List** | **Designs** | **Charts** | **Filters** | **Styles** | **Packages** | **Recent (2)** | **Print** |
|---|---|---|---|---|---|---|---|---|

Open old Reports Section...

### List
Listing of all available reports. List can be filtered by report type.

### Designs
Built-in and custom (user-defined) report designs. Each report design is linked to a specific data source. The data source defines the fields which are available for columns, sorting, or grouping.

### Charts
Create bar, column, line, and pie charts based on summary data.

### Filters
Create & Save commonly used filters. Filters are applied to Reports, Charts, and report Packages.

### Styles
Choose colors, fonts, and point sizes for report layouts.

### Packages
Combine a filter, style, and report or chart into a single package. Packages can be grouped into categories and loaded with one click. Provide a distribution list and schedule for automated report delivery.

**My Favorites**

Addresses

Phone List

# Report List
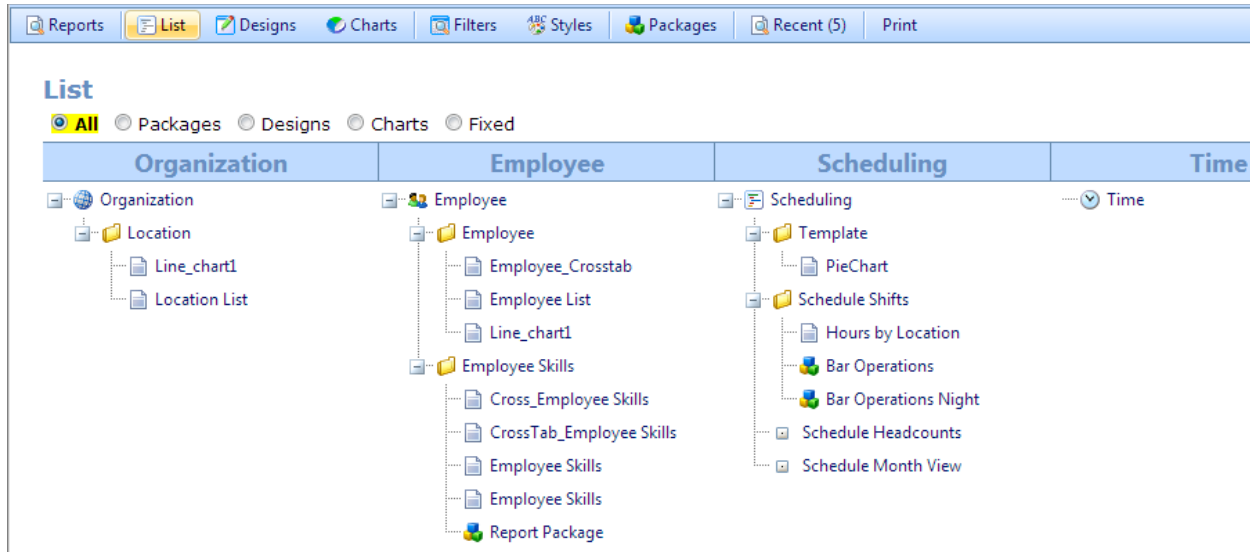


# See Also

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

- Reports Overview

- Understanding Report Designs

- Report Resources

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

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

## Overview

Use the Location and Admin sections to set up the Location Portal. See the following How To's:

- Setting Up Location Week Days and Special Days
- Setting Up Crews, Labor Pools, and Shift Groups
- Setting Up Admin Information for Location
- Setting Up Admin Information for Privileges
- Reviewing Passwords

## Setting Up Location Week Days and Special Days

Use the Location section to control settings that are specific to your location. You can modify week day information to use in building schedules. You can also identify special days that are different than a normal work day.

Refer to the following How To's.

### Setting up Week Days

**To set up Week Days:**

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

2. On the left navigation under Settings, click **Week Days**.
   Week Days window displays in the right pane.
   **Explanation:** The question mark by each setting displays a brief description of the setting.

3. 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 this day is important to your organization, select a Rank or leave a default of 1. (9 highest/1 lowest)
   **Note:** Days with the highest rank are filled first. If a shift is empty, it generally occurs on the lower priority days.

5. **Work Days, Start Time, End Time,** and **Max Head Count** - leave blank. (Custom Module use for Extended Scheduling)

6. Click **Save**.

# Setting up Special Days

**To set up Special Days:**

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

2. On the left navigation under Settings, 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 other Special Day Types in your organization.
   **Explanation:** Your organization can enter special day types in the Enterprise portal. For example, Christmas Vacation.

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 a Special Day you have created in your location.
   **Explanation:** When the Enterprise Administrator creates Special Days in the Enterprise portal, they display in your list without a delete option. They will take effect for your location.

**To delete a Special Day:**

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

2. On the left navigation under Settings, click **Special Days**.
   Special Days window displays in the right pane. Special Days are listed. Special Days that were created in your location display an **x** under the Delete column.

3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete special days starting on: x date?

4. Click **OK**.

# Setting Up Crews, Labor Pools, and Shift Groups

Use the Location section to set up lists of employees that are specific to your location. There are three types of groups and each is described as follows:

- **Crews** — allow you to group, filter and report on a subgroup of your employees. For example, you can assign employees to a full time or a part-time crew or group employees into crews for Department A and Department B.

- **Labor Pools** — allow you to Auto Fill your schedule using groups of employees. There are two types of Labor Pools: Scheduler assigned and volunteer. Employees can volunteer to be included in volunteer Labor Pools in the Employee portal.

- **Shift Groups** — allow you to group, filter, and report on a subgroup of your scheduled shifts. For example, night shift or weekend shift or first, second, and third shifts.

Refer to the following How To's.

## Setting up a Crew

This How To covers setting up a crew. Once a crew is established, you can click on it and assign or unassign employees. Crews are useful for filtering in Options and are used in several sections of the Location portal: Employees, Templates, and Schedules. When a Crew is created, a new filter for Crews is added to the Options in the three sections listed above.
**Important:** Each employee can be assigned to only one Crew.

**To set up a Crew:**

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

2. On the left navigation under Lists, click **Crews**.
   Crews window displays in the right pane.

3. Type the name of the Crew in the New Crew text box.

4. Click **Add**.
   Crew name is added to the list of crews.

**To assign an employee to a Crew:**

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

2. On the left navigation under Lists, click **Crews**.
   Crews window displays in the right pane.

3. Click on a **Crew Name**.
   Edit Crew window displays.

4. Select the name of the employee you want to assign and click the right arrow to move them to the Assigned list.

**To unassign an employee from a Crew:**

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

2. On the left navigation under Lists, click **Crews**.
   Crews window displays in the right pane.

3. Click on a **Crew Name**.
   Edit Crew window displays.

4. Select the name of the employee you want to unassign and click the left arrow to move them to the Assign list. This list includes employees available for assignment.

# Setting up a Labor Pool

This How To covers setting up a labor pool. Once a labor pool is established, you can click on it and specify start and end dates. You select the check box to indicate employees are able to volunteer to be in the labor pool as well as assign or unassign employees to the labor pool.
**Important**: Employees can be assigned to multiple labor pools.

**To set up a Labor Pool:**

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

2. On the left navigation under Lists, click **Labor Pools**.
   Labor Pools window displays in the right pane.

3. Type the name of the Labor Pool in the New Labor Pool text box.

4. Click **Add**.
   Labor Pool name is added to the list of labor pools.

5. To add parameters to the Labor Pool, click on the Labor Pool Name.

6. Enter the Date Range. Leave blank if it is an on-going Labor Pool.

7. Select the Volunteer check box if employees will be able to volunteer to be in the Labor Pool.

8. To assign employees, highlight the employee name and click on the right arrow to move them to the Assigned list.

9. To unassign employee, select the name of the employee you want to unassign and click the left arrow to move them to the Assign list.

10. Click **Save**.
    **Important:** When using Auto Fill to fill empty shifts, you will be able to select a Labor Pool if desired.

# Setting up a Shift Group

This How To covers setting up a Shift Group. Shift Group are used to define sets of shifts. They are subgroups of your scheduled shifts. Once a Shift Group is established, you can select it in a shift and it is useful for filtering in Options n the Schedules section or Templates section.
**Important:** Each shift can be assigned to only one Shift Group.

**To set up a Shift Group:**

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

2. On the left navigation under Lists, click **Shift Group**.
   Shift Group window displays in the right pane.

3. Type the name of the Shift Group in the New Shift Group text box.

4. Click **Add**.
   Shift Group name is added to the list of shift groups.
   **Important:** A Shift Group can be assigned to shifts in the Template and Schedules sections. See
   Templates Section Overview and Schedules Section Overview.

# Setting Up Admin Information for a Location

There are several types of information available from the Location folder in the Admin section. Included are:

- Adding Location Information

- Adding a Unique ID

- Downloading Data — gives you the ability to download real-time setup data, employee and station information, and schedules

Refer to the following How To's.

## Adding Location Information

Use the Information window to view and edit location information. Once a location is established in the Enterprise portal, you can log into and edit location information from the Location portal.

**To add location Information:**

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

2. On the left navigation under Location, click **Information**.
   Information window displays in the right pane.

3. On the Information window, Sign In Code displays as read-only. This is the account code that is used to log on to the Location and Employee portals.

4. Verify the **Name**. This is the name that displays in the top left menu bar when the Location is opened.

5. Enter additional address information as desired.

6. Under Time Zone, select the **Time Zone** using the drop-down list.

7. 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.

8. Leave **Custom Date Format** and **Custom Time Format** fields blank for U.S. For other format options, contact ScheduleSource.

9. You cannot edit fields in the Enterprise section.

10. Click **Save**.

## Adding a Unique ID

Use the Globally Unique ID window to create a Location Public Page URL to view published schedules. It also provides an iCal formatted data link.

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

2. On the left navigation under Location, click **Unique ID**.
   Globally Unique ID window displays in the right pane.

3. Click **New**.
   A link to use for a Public Page and iCal formatted data displays.
   **Explanation:** A Globally Unique ID is automatically created and can be used to view published schedules for your location and as a link to iCal formatted data. This link can also used with the Time module for clocking from a Kiosk. See Part II Additional Modules.

# Downloading Data

Use the Downloads window to build and download current data involving setup, employees, stations, and schedules. You may download the information in text (TXT) format, i.e., tab-separated values that can then be cut and paste into Microsoft Excel. Or, you can download a comma-separated values (CSV) format, i.e., opens in Excel and displays a spreadsheet.

**To download data:**

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

2. On the left navigation under Location, click **Information**.
   Information window displays in the right pane.

3. Click on the **TXT** or **CSV** link by the data you would like to download.
   Using CSV formats the data into an Excel spreadsheet.

4. Click **OK**.

5. Open the download to view the data and/or save the file.

# Setting Up Admin Information for Privileges

There are several types of privileges you can give the employees using the Admin section. They include employee access to the Employee portal and the specific rules that govern how the swap board works for this location. Keep in mind that the privileges you establish in Admin apply to all employees assigned to this location. Refer to the following:

- **Setting Up Employee Access** — allows you to give employees access to the Employee portal, but allows you to control what they can see and do

- **Setting Up Swap Board Rules** — allows you to give employees access to the swap board in the Employee portal and control how swapping works in this location

Refer to the following How To's.

# Setting Up Employee Access

Use the Employee Access window to grant privileges to all employees assigned to this location. This window determines information that displays in the Employee portal. While privileges may be changed at any time, they take effect immediately when you save the window.

**Note:** Employees can always view their schedule, calendar/events, and their contact information.

**To set up Employee Access:**

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

2. On the left navigation under Privileges, click **Employee Access**.
   Employee Access window displays in the right pane.

3. On the Employee Access window, select the desired check boxes in the View category. If no view features are selected, the Employee portal for this location does not display a view link. Selections include:

| View features | If enabled... |
|---|---|
| Full schedule | Allows employees to view shifts for all employees. If this is not selected, an employee only see their own schedule. |
| All contact info | Allows employees to view names, phone numbers, and emails of coworkers assigned to your location. |
| All employee days off | Allows employees to view granted days off for all employees at this location. Helps employees to find days with few other granted day-off requests. |

4. Select the desired check boxes in the Edit category. If edit features are not selected, the Employee portal for this location displays information so that an employee can view it, but not edit it. Selections include:

| Edit features | If enabled... |
|---|---|
| Contact Info | Allows employees to view shifts for all employees. If this is not selected, an employee only see their own schedule. |
| Scheduling Parameters | Allows employees to update their max days/week, max hours/week, and max shifts/day. |
| Availability | Allows employees to update their availability for global, local, and date-based profiles. |
| Single Day Override Availability | Allows employees to enter Single Day Override availability. These entries, when present, are used in scheduling in place of the profile availability. |
| Request Days Off | Allows employees to add days off requests. Requests are granted by a scheduler before they become effective. When granted, they display in the Employee portal. |

5. Select the desired check boxes in the Approvals category. If selected, this feature lets the scheduler know that the employee has seen the schedule. A green **OK** displays on approved shifts in the location schedule.

| Approvals feature | If enabled... |
|---|---|
| Employee shift approval | Allows employee to approve working future shift. When schedule is published, employees can approve each shift individually or mass-approve all schedules. Approvals can also be undone by the employee. **Note:** Approval is automatically undone if a scheduler 1) reassigns the shift, 2) changes the date, or 3) changes the shift times. |

6. Click **Save**.

# Setting Up Swap Board Rules

Use the Swap Board Rules window to give employees access to the swap board in the Employee portal and to control how the swap board will operate in your location. With swap board access, employees can find a replacement for shifts they are unable to work or want to trade. Swap board rules are specific to each location and each employee in the location as well as the station. They include the following:

- **Schedules** — When you add a new schedule, the default option is **Yes** to Allow Swapping on the Add New Schedule window in the Location portal. You can select **No** if you do not want shifts on this schedule being swapped.

- **Employees** — When you edit an employee record in the Location portal, there is a check box to Allow Swapping on the Edit Employee > Scheduling tab. The default is **Yes**.

- **Stations** — When a station is established in the Enterprise portal, there is a check box to Allow Swap on the Edit Station window. This cannot be changed in the Location portal, only in the Enterprise portal.

**To set up Swap Board Rules:**

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

2. On the left navigation under Privileges, click **Swap Board Rules**.
   Swap Board Rules window displays in the right pane.

3. On the Swap Board Rules window, select the desired check boxes in the Enable /Approve category.

| Enable / Approve features | If enabled... |
|---|---|
| Allow Swapping/Claiming shifts | Makes the swap board available to employees. Allows employees to trade shifts, schedule themselves to 'empty' shifts or post their shifts on the swap board to make them available for others to try to claim. Likewise they can try to claim other shifts that are available. It is also where shifts display if a bid board is created. |
| Allow Trading/Offering shifts | Allows employees to request shift offers for a possible available shift and lets the current employee choose the best offer for their available shift. Allow Swapping/Claiming Shifts must be enabled. |
| Allow Trading Notes | Requires employee posting shift to put in a note in description. Allows the employee offering a shift to include a note. Allow Trading/Offering Shifts must be enabled. |
| Require Approval | Adds an additional step to the swap process for manager approval being required. Employees trying to claim a shift will receive a 'pending' status. It prevents swaps from occurring until a manager approves it (via the SwapBoard Link under Schedules). |
| Swap Lead time (hours) | Prevents swapping assigned shifts if they are less than the Lead Time from today. Useful for avoiding last minute changes to schedules, and ensuring that schedules are finalized by some date. For example, if lead time is 48, an assigned shift for tomorrow (24 hours away) could not be placed on the swap board, or claimed. |

| Empty Shift Lead time (hours) | Prevents empty shifts from being claimed if they are less than the lead time from today. Thus, only the scheduler could fill the remaining empty shifts in the schedule as no one can claim them. |
| --- | --- |

4.  Select Scheduling Constraints features.

| Scheduling Constraints features | If enabled... |
| --- | --- |
| Enforce max hours | Prevents employees from claiming shifts that would make their total hours for a day or week exceed their maximum hour setting. |
| Enforce max days | Prevents employees from claiming shifts that would make their total days for the week exceed their maximum days setting. |
| Enforce max shifts/day | Prevents employees from claiming shifts that would make their total shifts for the day exceed their maximum shifts/day setting. |
| Enforce downtime & gap limits | Prevents employees from claiming shifts that would violate the minimum downtime between days, and the min and max gap settings for split shifts. |
| Maintain skill level | Requires that the employee claiming a shift have a skill level equal to or greater than the currently assigned employee. |

5.  Select Additional Settings features.

| Additional Settings features | If enabled... |
| --- | --- |
| Max consecutive days | Prevents employees from claiming shifts that would give them consecutive days scheduled in excess of this value. Leave blank if no limit. |
| Allow overlap (minutes) | Allows employees to claim shifts that overlap with a shift they are already working Zero minutes is the default. |
| Allow Split/Merge | Allows employees to split or merge their shifts. Useful for putting partial shifts on the swap board and combining many short, back-to-back shifts (for readability). |
| Show Employee Name | Shows employee name on the swap board for the shifts posted. |
| Show Station Name | Shows the station name on the swap board for the shifts posted. |

| Show Note | Shows note on the swap board for the shifts posted. |
|-----------|-----------------------------------------------------|

6. Click **Save**.

# Reviewing Passwords

Use the Passwords folder in the Admin section to review passwords for both Employees and Users. While you cannot change the passwords in this section, you can be alerted to problems. To change passwords:

- Go to My Settings Information to change your user password

- Go to Employees and select an employee to change an employee password.
  **Note:** You must have role privileges to change an employee's password. Otherwise, it is done by the employee or by your administrator in the Enterprise portal.

## Password Guidelines

We recommend that you use the following Password guidelines:

- At least 8 characters in length

- A mixture of letters and numbers

- Not a variation of the user name

Refer to the following How To's.

## Check Employees Passwords

**To check Employees passwords:**

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

2. On the left navigation under Passwords, click **Check Employees**.
   Check Employee Passwords window displays in the right pane.

3. Scroll down to review employee names and see an assessment of the employee passwords.

## Check Users Passwords

**To check Users passwords:**

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

2. On the left navigation under Passwords, click **Check Users**.
   Check User Passwords window displays in the right pane.

3. Scroll down to review user names and see an assessment of the user passwords.

# Chapter 4 - How To's for Managing Stations and Employees

Before you use Stations and Employees to schedule shifts, it is helpful to review the resources you are working with. Frequently, organizations find it most efficient to add to and maintain station-related and employee-specific data in the Location portal.

- Stations — use the Stations section to enter station priority and pay rate, review status, assign employee priority (skill level at that station), and to view a summary of all station-related information.

- Employees — use the Employees section to enter employee priority and pay rate information, enter or review scheduling parameters and availability, and allow or disallow swapping privileges.

## Stations Section Overview

Use the Stations section to define the distinct jobs or work areas in your location. When you build schedules, you must assign a shift to a station. Stations are initially established in the Enterprise portal. However, since this section is a dual-entry area, you can make changes to Station records in both the Location portal and Enterprise portal. Once you edit information and save your changes, the station data is updated in both portals. You cannot add new stations from the Location portal.

Refer to the following description of operations:

- **Setting up Stations** — this includes station information and setting the priority of assigned employees.

  o **Entering station information** — use the Edit Station window to set the station's relative priority in your location and establish a pay rate. Priority is used when you Auto Fill shifts in a schedule, i.e., shifts in the most important stations are filled before shifts in less important stations. Pay rate is used to determine the cost of a schedule. When an employee who is assigned to a shift does not have a pay rate, the station pay rate is used to calculate shift costs. In addition, you can see if the selection is enabled to allow employee swapping of shifts. However, this setting is selected and maintained in the Enterprise portal.

  o **Entering employee priority (Skill Level)** — use the Employees window to view employees who are assigned to the station and enter their relative priority. This priority is used when you Auto Fill shifts in a schedule. Those with the highest priority, 9, are assigned to shifts before those with a lower priority. Lowest priority is 1.

  o **Using Mass Update Skills Tool** — use the Mass Update Skills tool to quickly assign the priority or skills of multiple employees to one or more stations. You can also use the Mass Update Skills tool to clear skill entries from station assignments.

- **Managing Stations** — this includes using the Stations link to view a list of stations in your location and their specific information: rank, pay rate, allow swap, description, and number of assigned employees. Use the Status window to view the summary of usage for the station. Use the Options tab to control the way your list of stations displays in the Menu Tab: an alphabetical list, stations grouped by rank, or a custom field.

Refer to the following How To's.

# Setting Up Stations

You can set up stations in the Location portal. Information added in the following windows displays in the Enterprise portal.

## Entering Station Information

**To enter station information:**

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

2.  On the left navigation under Stations, click on a station name and click the **Edit** tab.
    Edit Station window displays in the right pane.

3.  On the Edit Station window, verify the station Name. This is a display-only field. Changes to Name must be made in the Enterprise portal.

4.  Select a station **Priority** using the drop-down list.

5.  Type a Pay Rate for an hourly rate of pay. This should be the average cost paid to work this station.
    **Note:** When an employee is assigned a pay rate, that pay rate that is used to calculate the cost of a shift the employee is assigned to. If no pay rate is entered for an employee, the station pay rate is used to calculate the cost of a shift.

6.  Description is a display-only field. Changes to Description must be made in the Enterprise portal.

7.  Allow Swap is a display-only field. Changes to Allow Swap must be made in the Enterprise portal.

8.  Click **Save**.

## Entering Employee Priority

**To enter employee priority (Skill Level):**

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

2.  On the left navigation under Stations, click on a station name and click the **Employees** tab.
    Employees @ station name window displays in the right pane.
    **Note:** The window defaults to the **Assigned** link, showing a list of Employees assigned to this station.

3.  To change the employee's relative priority or skill level at this station, enter a number between 0-9, 9=highest.

4.  To remove this employee from being assigned automatically to a schedule in this station, clear the text box and leave it blank.
    Employee name is removed from the list. It now displays in a separate available table.

5.  To view a listing of all employees, including those who do not have skills at this station, click the **All** link.
    Listings of assigned employees and available employees display.
    **Note:** For an employee to be available for automatic and manual assignment, a priority cannot be blank. A number from 1-9 ensures the employees are considered during Auto Fill. The number zero indicates the employee is not assigned via Auto Fill, but that you can manually schedule this employee to a shift in this station.

6.  Make changes to employee priority as desired and click **Update**.
    New tables display to list Assigned and Available employees.
    **Important:** An employee, who is assigned to the same station in more than one location, may have different skill levels at that station in each location.

## Using the Mass Update Skills Tool

**To use Mass Update Skills tool:**

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

2. On the left navigation under Tools, click **Mass Update Skills**.
   **Note:** If the Tools menu does not display in your Stations section, contact your Enterprise portal administrator. Ensure that the Admin > Enterprise System setting for Enterprise Skills is set to Off.

3. Select the station you want to change employee priority skills for.
   Station is highlighted.

4. Select the level from the drop-down list.

5. Select the employees you want to assign that level to.

6. Click **Update**.

# Managing Stations

You can view and manage station information in the Location portal.

**To view station information for your location:**

1. Click the **Stations** link on the top menu.
   Stations home page displays.

2. On the Stations home page, click the **Stations** link.
   OR
   On the left navigation under Stations, click on a station name and click **Stations** on the right toolbar.
   Stations window displays station-related information: rank, pay rate, allow swap, description, and number of assigned employees.

3. To view a summary of usage information for a station, on the left navigation under Stations, select a station name. Click **Status**.
   Usage of station name window displays # skilled employees, # template shifts, and # schedule shifts.

4. To change the way the list of stations display under the Stations folder, click **Options** on the left toolbar.
   Menu Display selections display.

5. Select the display option and click **Apply**.

# Employees Section Overview

The Employees section contains the records of all employees in your location. They are listed according to the Options you select in the left navigation. For example, group them by status, crew, or in alphabetical order.

Employees are established in the Enterprise portal and then assigned to your location. In addition, each employee may be assigned to one or more stations in your location. You can rank employee skills at each station, and when you build schedules, employees are assigned to a shift based on that ranking as well as the importance of the station and the employee's scheduling parameters and availability information.

You can enter and edit employee summary information using the Employee section. Since this section is a dual-entry area, you can make changes to Employee records in both the Location portal and Enterprise portal. Once you edit information and save your changes, the employee data is updated in both portals.

Refer to the following description of operations:

- **Setting Up Employee Information** — This includes employee information, changing status, setting employee skills at stations, viewing availability, and managing leave for one employee. See How To's for each of the following:

  o **Editing Employee Summary Information** — add to employee information so it is useful in your location. This includes personal data, contact information, and scheduling data such as rank, pay rate, and the ability to use the swap board. Also included is the time zone setting used if the Time module is active. See Part II Additional Modules.

  o **Changing Employee Status** — change an employee's status to inactive or from inactive to active. 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. An employee can be inactive in one location but still be active in another location. To make an employee inactive or active in every location in your organization, you must enter the information in the Enterprise portal.

  o **Editing Employee Stations** — an employee must be assigned a skill level at a station before they can be scheduled to work shifts at that station. You can edit an employee's priority (skill level) at a station in the Employees section as well as in the Stations section.

  o **Entering Employee Availability** — you can enter an employee's availability for the entire organization, i.e., global availability, or for your location. You can also add a local date-based availability for your location. Availability and preferred availability times allow you to schedule employees at times they are willing and able to be at work.

  o **Viewing, Adding, Granting, and Denying one Employee's Leave** — when you select an employee, you can view, add, grant, deny, and delete that employee's leave requests. You can use the Manage Leave tool to grant leave for more than one employee in the same window.

- **Managing Employees** — The Tools folder provides you with summary views and mass update features for all employees. See all employees on one window, and quickly update a field for multiple employees at once. Use the Options tab to control the way your list of employees displays in the Menu Tab: an alphabetical list, or group employees by crew, labor pool, or status. You can also filter using a custom field. See How To's for each of the following:

  o **Updating Employee Records Using Mass Update** — use this tool to see all employees on one screen and update a field for multiple employees at once. You can also use this window to sort your employee information by column.

  o **Viewing Assigned Stations and Skills** — use this tool to see each employee and the station to which they have been assigned.

  o **Viewing Availability** — use this tool to view all employees' availability. Set the window to display any week, day, or the number of employees or heads assigned.

  o **Updating Availability** — use this tool to select employees and change their rank, available times, preferred times, global and local profiles, and date-based profile.

  o **Managing Leave** — use this tool to view and act on all employee leave requests. You can also enter a leave request for one employee from this window, and grant, deny, or delete a leave request.

  o **Setting Up Rotations** — use this tool to enter a repeating pattern of work, i.e., set up a rotation, and assign employees to it.

Refer to the following How To's.

# Setting Up Employee Information

There are several menu selections and sub-menus that provide links for entering employee information in the Location portal.

## Editing Employee Summary Information

**To edit Employee Summary Information:**

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

2. On the left navigation under Employees, select an employee name.
   Availability window displays in the right pane.

3. Click **Edit**.
   The Edit Employee window displays the last employee window you were working with.

4. Click the **Personal** tab.
   Edit Employee window displays employee information.

5. We recommend that you enter a **Start Date** and a **Birth Date** if you want to use these dates as criteria in filling a bid board.

6. Click **Save**.

7. Click the **Contact** tab.
   Edit Employee window displays employee contact information.
   **Note:** Many organizations ask Employees to enter this information in the Employee portal.

8. Click the **Scheduling** tab.
   Edit Employee window displays employee scheduling information.

9. Enter an employee **Rank**, and **Pay Rate**, and ensure the **Allow Swapping** check box is selected if this employee can use the swap board.

10. Click the **Time & Attendance** tab if the Time module is active. See Part II Additional Modules.
    Edit Employee window displays employee time zone information. In most cases, you will use the location setting.

11. Click **Save**.

## Changing Employee Status

**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 inactive, a delete option displays on the Status window. Deleting an employee also deletes ALL data related to that employee in your location. However, employees cannot be deleted if they are scheduled in any active schedules or have any time entries.

# Editing Employee Stations

**To edit Employee Stations:**

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

2. On the left navigation under Employees, select the employee whose Stations you would like to view.

3. Click the **Stations** tab.
   Stations for employee name display. The Stations window defaults to Assigned stations. Assigned includes all stations the employee has a skill level for: 0 for manual assignment or 1-lowest to 9-highest.

4. Click **All** to see a list of all stations available. All includes stations the employee can be assigned to by entering a priority or skill level.

5. Enter a number under **Priority** to all of the employees who work at this station.

6. Click **Update**.

# Entering Employee Availability

**To enter Employee Availability:**

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

2. On the left navigation under Employees, select the employee whose Availability you would like to view.

3. Click the **Availability** tab.
   Availability for employee name displays.

4. Enter Global availability for normal weekly availability. This populates all locations the employee is assigned to.

5. Enter Local availability if the employee has a different availability for just this location. Local availability overrides Global availability if both are entered.

   **Important:** Local availability only applies to the location it is entered in. It does not apply to all locations the employee is assigned to.

6. Select whether the employee is **ON** or **OFF** on a day, and give the day a priority between 1-lowest to 9-highest if it is an especially good or bad day for the employee to work.

7. Enter specific availability time in **avail** and preferred times in **pref**. When you use Auto Fill, the system tries to place employees in shifts within their preferred times. However, if employees are needed for shifts that are not in preferred times but are within their full availability, it assigns the employees to the shifts.

8. Click the **Add Local Date-Based** link to add date-based availability for a specific time frame. This date-based availability overrides both Local and Global availability. However, it only applies to the location it is entered in. It does not apply to all locations the employee is assigned to.

   **Important:** When employees are assigned to a Rotation under the Tools folder, the Rotation defines their availability. Do not enter any other availability.

9. Type a **Name**, add **Dates**, and click **Save**.

10. Availability dates display in the calendar. Click on **+** to display a Single Day Override window.

11. Make a change to availability and click **Save**.
    Single Day Override information displays on calendar.

# Viewing, Adding, Granting, and Denying One Employee's Leave

**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.

# Managing Employees

Use the Tools folder to help you manage employees. It provides a variety of summary views and mass update features.

## Updating Employee Records Using Mass Update

**To update employee records using Mass Update:**

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

2. On the left navigation under Tools, click **Mass Update**.
   Mass Update window displays columns for the following: Update, Status, Name, Crew, Username, Min/Max Hours/Week, as well as Max Days/Week, Shifts/Day, Hours/Day, and Pay/Hour.
   **Note:** Status and Username are display-only fields. Name is a link to the Edit Employee window for the employee Name. Use this window to update other employee-related fields for some or all of the employees.

3. To change the order of the columns, hover over the column title until the cursor is a cross with arrows on each end. Click on the column title and drag it to the new location.

4. To sort the table by the values in one column, hover over the column title until the following message displays: Click here to sort. Click on the column title and an arrow displays indicating the sort is either ascending or descending. Click on it again to change the sort order.

5. To update an employee-related field, select the field name using the drop-down list in the Field text box.

6. Enter the change in the text box after the = sign.

7. Select the check box next to all employees whose records should be updated.
   **Note:** To quickly select all employees, click the **Select All** button. To quickly clear all check boxes, click the **Reset** button.

8. Click **Update**.

## Viewing Assigned Station Skills

**To view assigned Stations Skills:**

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

2. On the left navigation under Tools, click **Station Skills**.
   Station Skills window displays a list of all employee names, crew assignments, and the number of assigned stations.

3. To change the column display, click on the column title and drag it to the new location.

4. To sort columns in ascending or descending order, click on the column title and select Sorted asc or Sorted desc.

5. To view station assignments for an employee, click on the employee name.
   Employee Stations window displays.

# Viewing Availability

**To View Availability:**

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

2. On the left navigation under Tools, click **View Availability**.
   View Availability window displays employee availability. View by Week, Day, or Heads,i.e., employees available.

3. Select the time period you would like to view availability.

   o Type a specific date in mm/dd/yyyy format and click **Load**. This displays the week schedule that contains this date.

   o Use the arrow buttons to move forward and backward.

   o Select Week, Day, or the number of Heads.

4. Click on an Employee name to view, enter, or edit that employee's Global or Local availability. Add Local Date-Based availability to cover unique circumstances.

# Updating Availability

**To Update Availability:**

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

2. On the left navigation under Tools, click **Update Availability**.
   Mass Update Availability window displays all employees.

3. To update many employees' availability, select the check box by the employee name(s) in the Update column or use Select All or Reset.

4. To enter new availability profile times, complete the New availability profile fields. Select whether the employee is ON or OF, the rank date 1 = low 9= high, and type the available times and preferred times.

5. Select one of the following.

   o Add/Replace GLOBAL Profile

   o Add/Replace LOCAL Profile

6. Click **Update**.
   Employee availability profiles for the employees you selected are updated to reflect the new availability profile.

7. To delete many employees' availability profiles, select the check box by the employee name(s) in the Update column or use Select All or Reset.

8. Select **DELETE GLOBAL Profile** or **DELETE LOCAL Profile** and click **Update**.

9. To enter, replace, or delete a DATE-BASED Profile, select the Action using the drop-down list.

10. Enter the employee **Name**.

11. Enter the **Date Range**.

12. Click **Update**.
    **Important:** You can also reset all employees' availability to Off by selecting Add/Replace Global Profile. This forces employees to enter their new availability before they can be scheduled to work. For example, when part-time students at a university receive a new semester class schedule, it may be helpful to have them enter new availability based on that schedule.

# Managing Leave

**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.**

# Setting Up Rotations

**To Setup Rotations:**

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

2. On the left navigation under Tools, click **Setup Rotation**.
   Availability Rotations window displays in the right pane.

3. Click **Add**. The window expands to include text entry boxes.

4. Type the **Name** and **Start Date**. Click **Save**.

5. To edit this rotation and assign employees, click on the name of the rotation.
   Edit Rotation window displays. You can define the pattern and assign employees from this window.

6. Under Pattern, click **Add**. The window expands to include entry information.

7. Enter the pattern in **Order**.

8. Enter the number of **Days** and use the drop-down list to indicate whether the employees in this pattern are **On** or **Off**.

9. Enter employee available times to work on those days. Leave blank for 24 x 7 availability. Do not enter availability in the Availability menu. The rotation assigned is their availability.

10. Click **Save**.
    Patterns display below in monthly schedule.

11. To assign an employee, select an employee in the Assignments list and click the left arrow to assign the employee.
    Assignments take effect for assigned employees on the day the pattern starts.

12. Click **Save**.
    Pattern information displays in Availability Rotations table.

13. To edit a pattern, click on the pattern name.

14. To delete a rotation, click the **x** associated with the pattern under the Delete column.

# Chapter 5 - How To's for Building and Managing Schedules

The major focus of your work in the Location portal is scheduling employees to cover shifts in stations and managing your workforce. To accomplish this, you may use some or all of the following sections of the Location portal. These sections work together to provide you with the tools you need to efficiently manage your location's workforce.

- Schedules — use the Schedules section to edit scheduling settings, build schedules, fill them with shifts, and assign the shifts to employees. Use tools to AutoFill, create breaks, and merge shifts as well as mass update. Review coverage and total costs and hours by station and employee. Check compliance and learn how to use the Swapboard and Bid Board. Archive shifts, delete shifts from schedules, and delete a schedule.

- Templates — use the Templates section to create weekly shifts for building schedules. Add break settings to automatically include breaks in shifts, review coverage including totals for stations and employees. Learn how to edit one shift and use mass update to quickly edit multiple fields, and delete a shift. When you create schedules, you can build them using templates and the shifts they contain.

- Forecasts — use the Forecasts section to create shifts to meet your Headcounts. Quickly build a Headcount Plan and use it to develop a template of shifts.

## Schedules

## Schedules Section Overview

Use the Schedules section to help you organize your workforce and ensure shifts are covered at all stations in your location. First, read Understanding Scheduling, then review and make any necessary changes to Scheduling Settings. See Editing Scheduling Settings.

Other settings that are used in the Schedules section are gathered from both the Stations section and the Employees sections. Remember that you added employee ranking and skill information in Setting Up Employee Information and station priority information in Setting Up Stations. Once you have an idea of how the Location portal uses this information, you can begin building schedules and assigning shifts to employees.

For How To's on building and working with schedules, see:

- Editing Scheduling Settings
- Building Schedules
- Adding Shifts
- Assigning Shifts to Employees

## Understanding Scheduling

When you build schedules and use Auto Fill to fill the shifts, processes take place behind the scenes based on scheduling settings and employee availability, rankings, skills, and max scheduling limit parameters. Review the following information to get an idea of how it works.

| To understand... | how it works |
|---|---|
| Use Auto Fill to fill scheduled shifts how it works - enforces all parameters | You can enter or edit scheduling settings for each Location in the Enterprise portal or in the Location portal in Schedules > Setup > Scheduling Settings. When you use Auto Fill, it considers the following:<br><br>• Employee availability, max scheduling limits, skill rankings, days off<br><br>• Schedule setting parameters<br><br>• Station rankings and Holidays entered |
| Rankings and Skills how they work with Auto Fill | You enter employee ranking and skills at stations in the Location portal, as most organizations do, or in the Enterprise portal. These ranking and skills are used by Auto Fill to assign employees to work shifts. Auto Fill considers:<br><br>• Employee ranking at a station: 9 is High, 1 is Low.<br><br>• Auto Fill does not assign an employee with a rank of 0. However, if you assign an employee a rank of 0, you can manually assign the employee to a shift. |

| To understand... | how it works |
|---|---|
|  | • Employee availability. If availability is not entered, Auto Fill assumes the employee is available 7 x 24. Availability is entered either in the Location portal or, if Location Admin settings permit, employees enter their availability themselves in the Employee portal. However, you should turn off the employee ability to change availability prior to building schedules.<br><br>• Data used in Auto Fill includes employee availability, employee schedule limit settings, pay rates, skill rankings, and schedule settings. |
| Changes in Scheduling data<br>how it works | • Changes take effect for future schedules - they do not affect schedules already built.<br><br>• If a schedule has been created, you can run Auto Fill again and it will change the schedule based on the most current data entered. This is especially useful when editing shifts and splitting them to accommodate employee changes in availability. |
| Making Employees *Inactive* or *Deleting* - <span style="color:red">Warning</span> | You can make an employee Inactive in either the Enterprise portal or the Location portal. When you make an employee inactive or delete an employee from the Enterprise portal, they are made inactive or deleted from **every** location. (Employee data cannot be recovered.) If you make them inactive or delete them from the Location portal, it affects only their status in that location. Inactive employees are not assigned to shifts in schedules and you do not pay for them.<br><br>• Making Inactive affects **All Active Schedules**. All data regarding the employee is deleted from active schedules beginning on the Inactive Date. This data is not recoverable.<br><br>• Making Inactive or Delete does Not Affect **Archived** Schedules.<br><br>• You cannot Delete employees if they are in past schedules that are still active.<br><br>• **<span style="color:green">Good Practice:</span>** Always Archive all past schedules in each location before changing employee or station status. |

# Editing Scheduling Settings

Use this window to set up the parameters for AutoFill in your location. Keep in mind that these settings can also be entered and edited in the Enterprise portal when a location is established.

**Hint:** It may be helpful to review the Scheduling Settings Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/LOCv3SCH1ScheduleSettings.pdf

**To edit Scheduling Settings:**

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

2. On the left navigation under the Setup folder, click **Schedule Settings**.
   Schedule Settings window displays in the right pane.

3. On the Schedule Settings 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 for the individual employee 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.

   Load Balancing Steps: 10     40    80   hours

   o 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 up to 20 hours of work before any employee gets 21 hours. 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 up to 40 hours while a less qualified employee may not receive any hours.

   o 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.

o 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.

   o 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.

   o 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.

   o 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**.

# Building Schedules

Use the Schedules section to build a schedule. Think of it like an empty box. It defines when and where employees are assigned to work. First you add a new schedule and then you fill it with shifts.

**Hint:** It may be helpful to review the Building Schedules Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/LOCv3SCH2BuildSchedule.pdf

**To build a New Schedule:**

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

2. On the left navigation under the Active folder, click **Add Schedule**.
   Add New Schedule window displays in the right pane. The date your work week starts displays

3. On the Add New Schedule window, enter a **Start Date** and the **Duration** of the schedule.

4. (Optional) Type a **Name** for the schedule, i.e., a month, date range, year. If left blank, the start date displays as the name. Active schedules display under the year and month in the Active folder.
   **Note:** Published and Approved fields are grayed out until the schedule is saved. You can return to the Schedule Settings window when you are ready and indicate that the schedule is published and approved.
   **Important:** Only published schedules display in the Employee portal.

5. Click **Save**.
   **Note:** You can return to this window at any time to make changes and update it by clicking on the Schedule > Settings tab.

6. (Optional) If your location uses Labor Pools, they display after you save the schedule settings. If you want to limit the shifts in this schedule to a specific Labor pool, select the Labor Pools this schedule applies to.

7. To see the schedule you just created in the list of schedules under the Active folder, click the Refresh symbol.

8. Once you have created and saved a schedule, see:

    o [Adding Shifts](#)

    o [Editing Shifts](#)

# Adding Shifts

Once you have entered the Schedule Settings, you can begin building the schedule by adding shift s. You can add shifts from a template, copy a previous schedule, or manually add shifts.

**To add Shifts:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to add shifts to. The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, Day, or History.
   Shifts window displays with the dates of the schedule. Additional toolbar selections display on right toolbar: Add Shifts, Tools, and Selected.

4. Click **Add Shifts** and select By Day, Templates, or Existing Schedules. How To's for each selection follow.

**To add shifts By Day:**

1. 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.

2. 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 to 8 hours.

3. Select one **Station** for this shift.

4. Select a Shift Group if you are using shift groups.

5. If this shift should be worked by an employee, select that employee. Understand that by selecting an employee, any other scheduling constraints are ignored.

6. 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.

7. The **Enabled** check box is selected by default. This allows the shift to be used for scheduling.
   **Note:** If not enabled, the shift displays as grayed out and cannot be used until it is enabled.
   **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.

8. Click **Save**.

**To add shifts using Templates:**

1. On the Copy Template(s) window, select the template that contains the shifts you would like to use in this schedule.
   Templates you select are highlighted.

2. Accept the default option of **Re-Apply Days Off** or select **Ignore Days Off**. See the following.

   o **Re-Apply Days Off** — Use when an employee is fixed in the template and has been granted days off. The system displays an empty shift, i.e., the employee is not inserted in the schedule for the days off that have been granted.

   o **Ignore Days Off** — Use when an employee is fixed in the template but you want the employee inserted in the schedule regardless of granted days off.

3. Click **Insert Shifts**.
   Shifts window displays with shifts inserted.

**To add shifts using Existing Schedules:**

1. On the Copy Schedule window, select the schedule you would like to copy.
   **Note:** Only schedules with the same number of days as the current schedule display in the list of schedules you can copy.
   Schedule you select is highlighted. Below the window with schedule options, the current schedule displays.

2. Accept the default option of **Re-Apply Days Off** or select **Ignore Days Off**.

3. Click **Insert Shifts**.
   Shifts window displays with shifts inserted and .

   Once you have added Shifts, see:

   o [Assigning Shifts to Employees](#)

   o [Editing Shifts](#)

# Assigning Shifts to Employees

Your schedule now includes a shift window that may have a list of empty shifts. If you chose to add shifts using an existing schedule, the shifts include the employees assigned to that schedule. There are two ways to fill empty shifts: use Auto Fill or manually select an employee to work the shift. A How To for each follows.

**Important:** Both methods of filling empty shifts allow you to honor employee and system constraints.

**Hint:** It may be helpful to review the Assigning Employees Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/LOCv3SCH4AssignEmpl.pdf

**To fill shifts using Auto Fill:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to add shifts to. The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar.
   Shifts window displays.

4. Under Tools, select **Auto Fill Shifts**.
   Auto Fill Shifts window displays.

5. Click on **Settings** to view scheduling settings.

6. Click on **Execute** to view shift settings.

7. Make any changes to the shift settings using the drop-down lists. For example, you may choose to fill each station or labor pool, one at a time.

8. Click **Execute**.
   Message displays: **Working**.
   When finished, a summary of the results display.

9. Click **Close and Refresh Shifts**.
   Shifts window displays with Employee assignments.
   **Note:** If there are any shifts that are still empty, you can use the following How To fill those shifts manually.

**To fill shifts manually:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to add shifts to. The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar.
   Shifts window displays.

4. In the Employee column, click on an employee name or EMPTY if Auto Fill did not fill the shift. Available Employees window displays listing a table of all employees you have given a skill to for the station and their availability, i.e., if they have conflicts. Links to Shift History, Codes, and About information are available. Review the following guidelines.

   - Available employees are listed in this order: First - no conflicts, Second - skill level, and Third – alphabetical. You can re-sort the chart by any column.

   - The cells listing employees with NO conflicts are highlighted in green.

   - The cells listing employees WITH conflicts are highlighted in gray and the conflict is displayed.

   - Click on schedule and contact icons to display the employee's 3-week schedule and employee contact information

   - If the Enterprise portal has entered Reassign Reasons, they display in a drop-down list and you can select them.

   - The shift open to reassignment is identified at the top of the window, highlighted in white.

5. Click on the name of the employee to assign them to the shift.
   If okay, employee name displays in the shift.

If not okay, warning window displays: Assigning employee will violate one or more availability settings. Proceed anyway?

6. Click **OK** or **Cancel**.

# Editing Shifts

After you create schedules and put shifts in them, you edit the shifts and create breaks in them. Depending on how your location handles breaks, you decrease the shift length hours paid. In addition, if you have back to back shifts, you may consider merging them together.

Refer to the following How To's on creating breaks and merging shifts.

**Hint:** It may be helpful to review the Editing Schedules Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/LOCv3SCH3EditSch.pdf

**To Create Breaks:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to create breaks for.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Click **Tools** and select **Create Breaks**.
   Create Breaks window displays.

5. Use the drop-down lists to select the break size, i.e., amount of time a break will take, as well as when a break can start.

6. Select the minimum shift length to establish eligibility to take a break as well as the minimum buffer, i.e., the amount of time employees needs to work before they can take a break.

7. Select the minimum headcount percentage to ensure your stations are covered when employees are taking a break. Shifts are automatically adjusted based on the break size to ensure this coverage.

8. Select the minimum headcount of employees who must be at their stations at all times.

9. Select the check box to Save Settings if you want to use these settings.

10. Click **Optimize**.
    Breaks are inserted into every shift that meets the break criteria you entered.

**To Merge Shifts:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to create breaks for.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Click **Tools** and select **Merge Shifts**.
   Merge Shifts window displays.

5. Click **Go**.
   Merged shifts display in the Shifts window.

# Canceling or Inactivating Shifts

After you have created a schedule and added shifts, you can cancel or inactive one or many of those shifts from the schedule. This can be especially helpful when weather conditions or circumstances prevent normal operations in your location

**To cancel or inactivate shifts:**

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

2. On the left navigation under the Active folder, click on the schedule with the shifts you would like to cancel or inactivate.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Select the check box at the end of the shifts you would like to cancel or inactivate.

5. Click **Scheduled** and select **Cancel/Inactivate**.
   Cancel/Inactivate Shifts window displays.

6. Select the reason the shift is being canceled or inactivated using the reasons in the drop-down list.
   **Note:** The list of reasons for canceling or inactivating a shift are entered in the Enterprise portal.

7. Click **Cancel/Inactivate**.
   Shifts remain in the schedule and are grayed out. You can re-activate the shift at anytime.

8. To cancel one shift individually, click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

9. Click on the Start time, i.e., 8:00 AM.
   Edit Shift window displays.

10. Click on the **Status** tab.
    Cancel/Inactivate option displays in window.

11. Select the reason the shift is being canceled or inactivated using the reasons in the drop-down list.
    **Note:** The list of reasons for canceling or inactivating a shiftare entered in the Enterprise portal.

12. Click **Cancel Shift**.
    Prompt displays the question: Cancel this shift?

13. Click **OK**.
    Shifts are canceled from the schedule and display as gray.

# Viewing Shifts

Once you have assigned shifts to employees, you can view the shifts using several functions: list, week or day.

**To view shifts:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to add shifts to. The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar and select the view option: List, Grid, Week, Day, or History.
   Shifts window displays in the configuration you selected.
   **Note:** If you selected history, all of the shift actions are listed.

# Using Mass Update

There are a number of features you can access from the Selected tab in the Schedules toolbar. They include:

- Update Shifts — When you need to update a number of shift fields or clear breaks from selected shifts, use the mass update features under Selections. Using Mass Update, you can quickly make changes to day, shift, break, station, shift group, and note.

- Assign Employees — Use the Assign Employees feature to assign one employee to a number of selected shifts. You can also clear assignments and clear breaks from a number of shifts.

- Clear Assignments — Clear assignments from a number of shifts at one time.

- Clear Breaks — Clear breaks from a number of shifts at one time.

- Assign/Clear BidBoard — Select Empty shifts and post them to or remove them from the Bid Board. See Using the Bid Board.

**Note:** If the updates you are making affect all shifts, use the Toggle All feature to select all shifts or clear all selected shifts.

Refer to the following How To's.

**Hint:** It may be helpful to review the Mass Updates Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/LOCv3SCH5MassUpdates.pdff

**To use Mass Update to update shifts:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to update.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Select the check box at the end of the shifts you would like to update.

5. Click **Scheduled** and select **Update Shifts**.
   Mass Assign window displays.

6. To update shift fields, select the check boxes of the shifts fields you would like update.

7. Enter the new information in the shift Fields for the field text boxes.

8. Click **Save**.
   Shift displays with updated information.

**To use Mass Update to assign employees:**

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

2. On the left navigation under the Active folder, click on the schedule with the shifts you would like
   to assign an employee to.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Select the check box at the end of the shifts you would like to assign the employee to.

5. Click **Scheduled** and select **Assign Employees**.
   Mass Assign window displays.

6. Click on the name of the employee you would like to assign to the shifts.
   Employee name displays in Shifts window by shifts you selected.
   **Note:** Scheduling parameters are not checked for the employee you choose to manually place in
   the shifts.

**To use Mass Update to clear assignments:**

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

2. On the left navigation under the Active folder, click on the schedule with the shifts you would like
   to clear assignments from.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Select the check box at the end of the shifts you would like to clear assignments from.

5. Click **Scheduled** and select **Clear Assignments**.
   Prompt displays the question: Clear employee assignments from selected shifts?

6. Click **OK**.
   Shift assignment changes to EMPTY.

**To use Mass Update to clear breaks:**

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

2. On the left navigation under the Active folder, click on the schedule with the shifts you would like to clear breaks from.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Select the check box at the end of the shifts you would like to clear breaks from.

5. Click **Scheduled** and select **Clear Breaks**.
   Prompt displays the question: Clear breaks from selected shifts?

6. Click **OK**.
   Breaks are cleared from shift.

**To use Mass Update to Assign/Clear BidBoard:**

**Note:** This is the only place that shifts can be assigned to a BidBoard. To do so, you must first create the Bid Board. See Using the Bid Board.

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

2. On the left navigation under the Active folder, click on the schedule with the shifts you would like to assign to or clear from the Bid Board.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. Select the check box at the end of the shifts you would like to assign to or clear from the Bid Board.

5. To assign a shift to the Bid Board, click **Scheduled** and select **Assign/Clear BidBoard**.
   Assign/Clear BidBoard window displays.

6. Click the **Assign** button.
   The word Bid is added to each shift.

7. To remove a shift from the Bid Board, click **Scheduled** and select **Assign/Clear BidBoard.**
   Assign/Clear BidBoard window displays.

8. Click the Remove from BidBoard(s) button.
   Prompt displays the question: Remove selected shifts from BidBoard?

9. Click **OK**.
   Shifts are removed from the Bid Board.

# Reviewing Totals

When you would like to view information about a schedule, you can display totals such as hours, cost, and shifts for each station or for each employee. They display for each day as well as a cumulative total for the week.

**Hint:** It may be helpful to review the Totals Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/LOCv3SCH6TotalsCost.pdf

**To review schedule totals:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to archive. The last scheduling window you were working on displays.

3. Click **Totals** on the right toolbar.
   Totals window displays.

4. Select either the **Station** or **Employee** radio button, depending of the type of information you would like to see.

5. Click on **Costs** to see the cost of this schedule at your location for stations or employees.
   **Explanation:** If an employee is assigned to a shift, the system uses the pay rate entered in the Edit Employee > Scheduling window. If the shift is empty or no employee is assigned, the system uses the pay rate entered in the Edit Station window. If zero rates are entered, the shift has a 0 cost to work.

6. Click on **Hours** to see the daily and weekly total number of hours for stations or employees.

7. Click on **Shifts** to see the number of shifts in this schedule for stations or employees.

# Reviewing Coverage

When you would like to view coverage information for a schedule, you can display individual amounts for each day, station, minimum, maximum number of shifts, number of hours, and even get a breakdown by hours and minutes. When a shift spans midnight, it is counted twice, once for each day. In addition, you can use coverage to compare shifts in your schedule with shifts that have been set up in a template, i.e., ideal coverage. Then, if there is a shortfall, you can generate additional shifts to meet the template number of shifts.

**To review schedule coverage:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to archive. The last scheduling window you were working on displays.

3. Click **Coverage** on the right toolbar.
   Coverage window displays the number of employees scheduled to work at each station during each schedule day.

4. Drag and drop columns to group information by that column.
   Coverage window displays columns grouped or ordered by the change you made.
   **Note:** To revert to the original display, click on the Coverage link again.

5. Click on the time of the Interval to set the amount of time to either 60, 30, or 15 minutes.
   **Note:** The smaller the interval is set to, i.e., 15 minutes versus 60-minute intervals, the more you will need to scroll through your window to view coverage information.

6. To compare the shifts in this schedule with the shifts in the template, click on the Comparison link.
   Select Comparison window displays.

7. Select the comparison template from the list and click **Apply**.
   Shift coverage where headcounts are deficient in the number of shifts in the schedule displays with a red highlight.

8. To add shifts, click the **Add Shifts** link.
   Adjust for Coverage window displays.

9. Change the Lengths of the shifts to match the coverage in the template.

10. Click **Generate Shifts**.
    Message relating to the action displays. If adding shifts, the number of shifts and hours display.

11. Click [Refresh List].
    New shifts are added to the schedule. Added displays under the Note column.

12. Click the Shifts link to view the added shifts. See Assigning Shifts to Employees.

# Checking Compliance

After you have build a schedule, added shifts, and assigned shifts to employees, you can check to see whether or not your scheduled shifts exceed the scheduling parameters for an employee. It is a review of hours, shifts, and availability and provides a double-check for shifts manually assigned. Employees' names display in on a shift with a pink background when out of compliance with one or more scheduling parameters.

**To Check Compliance:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to check for compliance.
   The last scheduling window you were working on displays.

3. Click **Compliance** on the right toolbar.
   Compliance window displays the criteria under Hours, Shifts, and Availability. When in compliance, a green check mark displays. When out of compliance, and red x displays and employees affected are listed.

4. Click on an employee name to view the shift that is out of compliance.
   The window automatically applies a filter to show the shifts for that employee.

5.  Make corrections as necessary.
    **Note:** A red box with an X  after No Overlapping Shifts means an employee is double-booked. This only happens when a Scheduler manually places an employee in a shift.

6.  To remove the filter, click on Options in the left navigation. Under DATA, click **All** and then click **Apply**.
    The list of all shifts displays.

# Using the Swapboard

Use the Swap Board tool to view the status of shifts. You can load shifts by category in a specific date range, or simply load all shifts after a certain date. When posted to the Swap Board, a shift is classified as one of the following:

- Pending - when a shift is claimed, but your Location portal settings require approval of the swap, it is classified as pending. Pending does not display if you do not require approval in Admin > Swap Board Rules. See Setting Up Swap Board Rules.

- Posted - indicates an employee posted a shift to the Swap Board.

- Empty - indicates a shift is automatically posted to the Swap Board because it is empty.

- History - shows all Swap Board shifts after the date entered.

**Hint:** It may be helpful to review the Swapboard Options Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/Locv3swapboardoptions.pdf

**To use the Swapboard:**

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

2.  On the left navigation under the Tools folder, click **Swap Board**.
    Swap Board window displays in the right pane.

3.  Enter the date from which to display shifts.

4.  Select the View: Posted, Empty, ALL, or History.

5.  Click **Load**.
    List of Swap Board shifts displays.

6.  Sort the list by any of the columns by clicking on the column title. Click it again to make the list in ascending or descending order.

# Using the Bid Board

Use the Bid Board tool to fill empty shifts in your schedules. When shifts are placed on the Bid Board, multiple employees can bid on them and you can select criteria to AutoFill the bids or manually assign them. See the Mass Update How To for instructions on Assigning and Clearing Shifts from the BidBoard.

The following configuration requirements exist.

- The following must be enabled in the Enterprise portal.

    o Go to Admin > System > Enterprise and set Show Open shifts on Swap Board to All. Empty shifts in your schedule can be placed on the Bid Board. If not placed on the Bid Board, they will be placed on the Swap Board for employees to claim. In the employee portal, a link to the Swap Board empty shift is [Check] and a link to the Bid Board empty shift is [Bid].

    o Go to Stations > Edit Station and select the check box to Allow Swap.

- The following must be enabled in the Location portal. Go to Admin > Privileges > Swap Board Rules and select the check box for: Allow Swapping/Claiming Shifts.

- The following Location portal settings must be used.

    o Go to Employee Information > Scheduling and select check box for Allow Swapping. Swap Lead time and Empty Shift Lead time do not affect Bid Board shifts.

    o Go to Schedules > Settings and ensure the schedule is published and select the Allow Swapping for All Employees or Specified Labor Pools.

**Hint:** It may be helpful to review the Bid Boards Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/Locv3BidBoard.pdf

**To use the Bid Board:**

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

2. On the left navigation under the Tools folder, click **Bid Board**.
   Bid Board window displays in the right pane.

3. Click on the [Add] link.
   Bid Board window displays.

4. Type the **Name** of the Bid Board.

5. (Optional) Type a **Description**.

6. Select **Assignment Mode**: Auto-Assign Only, Manual-Assign Only, or Both

7. Select ranking criteria to use in awarding Auto-Assign bids such as Employee Rank, Hire Date, Birth Date, and Bid Timestamp.

8. Click **Save**.

9. To display a list of Bid Boards, click the **List** tab.

10. To edit the Bid Board Settings, click on the name to open the settings window.

11. To award bids, click the **Shifts & Bids** tab.
    Shifts & Bids window displays.

12. Enter the Date or Dates and click **Load**.

13. Click [Award Bids]
    Award bids window displays.

14. Click **Auto-Award Shifts**.

15. To add shifts to the Bid Board, see Using Mass Update to Assign/Clear BidBoard.
**Note:** You add shifts to the Bid Board under Schedules. Select a schedule, list shifts, and select the shifts you want to add to the Bid Board. Click **Selected**, and select **Assign/Clear BidBoard**.

# Replacing an Employee

Use the Replace Employee tool in the Schedules section to replace one employee with another employee. You can also replace a scheduled employee with an Empty shift. This tool is useful when one employee leaves and you want to assign a new employee to the terminating employee's shifts or when an employee takes a leave that begins on one date and ends on another.

**To Replace an Employee:**

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

2. On the left navigation under the Tools folder, click **Replace Employee**.
Replace Employee window displays in the right pane.

3. Click on drop-down list for **Replace** and select either Empty or an employee name.

4. Click on drop-down list for **With** and select either Empty or an employee name.

5. Select the **Dates** for the Replace Employee to begin. Only one date for starting the replacement is necessary.

6. Click **Preview**.
Replacement window displays a list of shifts that the replacement covers. Clear the check boxes next to the Shifts that you do not want to have replaced.

7. (Optional) Type a note to display with the shifts being replaced.

8. Click **Replace Selected**.

# Archiving Schedules

When a scheduling period is past and you no longer need to use the schedule, you can archive it.

**Hint:** It may be helpful to review the Archive Schedules Help Card in the TeamWork Learning Center: http://www.schedulesource.net/support/LOCv32014ArchiveSch.pdf

**To archive a schedule:**

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

2. On the left navigation under the Active folder, click on the schedule you would like to archive.
The last scheduling window you were working on displays.

3. Click **Settings** on the right toolbar.
Schedule Settings window displays.

4. Click [Archive].
Prompt displays to verify the action. It reads that Archiving this schedule will preserve deleted employee & station info and prevent the schedule from being edited. It asks if you want to continue.

5. Click **OK** to archive the schedule.

6. You can also Archive a Schedule using the Schedules Summary Page. Click on the **Active** folder.
   List of Active schedules displays.

7. Click on the **Archive** link of the schedule you would like to archive. It displays in the Actions column.
   **Note:** You can sort the list of schedules by any column in the table.

# Using Over/Under Analysis

Use the Over/Under Analysis tool to view the current schedules shifts for each employee compared to the employee's scheduling information. See Editing Employee Summary Information.

**To use Over/Under Analysis:**

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

2. On the left navigation under the Tools folder, click **Over/Under Analysis**.
   Over/Under Analysis window displays in the right pane for the current schedule.

3. Review each employee's scheduling. Minimum, Hours, and Maximum scheduling display.

4. If the employee's shift assignments are over or under their schedule parameters, the values display in red.

5. Click on the hours at the top of the page to display previous and future schedules.

# Deleting Shifts from Schedules

After you have created a schedule and added shifts, you can delete one or many of those shifts from the schedule.

**To delete shifts from a schedule:**

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

2. On the left navigation under the Active folder, click on the schedule with the shifts you would like to delete.
   The last scheduling window you were working on displays.

3. Click **Shifts** on the right toolbar. Select List, Grid, Week, or Day.
   Shifts window displays in the configuration you selected.

4. There are several ways to delete a shift. One way is to select the check box at the end of the shifts you would like to delete.

5. Click **Selected** and select **Delete**.
   Prompt displays the question: Delete all selected shifts?

6. Another way to delete a shift is to click on the Start time.
   Edit Shift window displays with a **Delete** link.

7.  Click **Delete**.
    Prompt displays the question: Delete shift?

8.  Click **OK**.
    Shift(s) are deleted from the schedule.
    **Warning:** All information on the deleted shift is lost. This action cannot be reversed.

## Deleting a Schedule

After you have built a schedule, you always have the option of deleting it and the shifts it contains.

**To delete schedules:**

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

2.  On the left navigation under the Active folder, click on the schedule you would like to delete.
    The last scheduling window you were working on displays.

3.  Click **Settings** on the right toolbar.
    Edit Schedule Settings window displays.

4.  Click [Delete].
    Prompt displays to verify the action: Delete schedule? This will delete ALL shifts as well.

5.  Click **OK** to delete the schedule.
    Schedule is deleted.
    **Warning:** All information on the deleted schedule is lost. This action cannot be reversed. You can request to have a schedle restored by ScheduleSource, but there may be a cost.

# Templates

## Templates Section Overview

Use the Templates section to quickly create, control, and reuse weekly shifts in scheduling employees in your location. While the Enterprise portal may supply templates in some situations, we recommend building templates in the Location portal a majority of the time. The main reason for this is that you have control over the templates you create.

When a template is created in the Enterprise portal, the Enterprise portal maintains control over it. You cannot edit the template in the Location portal, but you can use the template to add shifts to a schedule you build in the Location portal. If you use the Enterprise template to add shifts to a schedule, you can edit those shifts once they are in your schedule.

# Workflow for Templates

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

- Create a template and use it in building schedules.

- Add shifts to a template and enable them so they can be used in multiple schedules.

- Use the mass update option to quickly view and edit multiple template shifts.

- Review coverage and view totals for stations.

## Guidelines for Working with Templates and Shifts

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

- Enable shifts, disable shifts, and re-enable shifts. Only shifts that are enabled are available for use in schedules. When a shift is disabled, it is grayed out. This gives you the ability to temporarily disable and shift and then re-enable it again as needed.

- Add or delete stations in a particular shift. To use a shift for a specific station, the shift is only available if that station is in your location.

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 and Employees

- Viewing Totals for One Employee

- Editing a Shift

- Using Mass Update

- Adding Break Settings

- Deleting Shifts

# Creating a Template

Use the Templates section to create a template. Use Add Template 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 Template.**
   Edit Template Settings window displays in the right pane.

3.  (Optional) On the Edit Template Settings 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.  Type a **Name**. This is the name of a template.

5.  (Optional - you can choose only one) Select a previously-developed template, schedule, or headcount plan to use in this template.

6.  Click **Save**.
    The template displays in the Location portal under Templates. If a Group was entered, it displays under the group name.
    **Note:** To change a template, 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:

    o   Adding a Shift

    o   Using Filters to View Shifts

    o   Reviewing Coverage

    o   Viewing Totals for Stations

    o   Viewing Totals for Employees

# 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 one **Station** for this shift.

8.  Select a ShiftGroup if you are using shift groups.

9.  If this shift should be worked by an employee, select that employee. Understand that by selecting an employee, any other scheduling constraints are ignored.

10. 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.

11. The **Enabled** check box is selected by default. This allows the shift to be placed in the template and used for scheduling.
    **Note:** If not enabled, the shift displays as grayed out and cannot be used until it is enabled.
    **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.

12. Click **Save**.
    Once you have added Shifts, see:

    o   Using Filters to View Shifts

    o   Reviewing Coverage

    o   Viewing Totals for Stations

    o   Viewing Totals for Employees

    o   Editing a Shift

    o   Using Mass Update

    o   Deleting Shifts

# Using Filters to View Shifts

Use filters to look at a 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, min, max, and hours. The shifts in the template are highlighted in green.

# Viewing Totals for Stations and Employees

Use the Totals tab to view shift totals for stations and employees.

**To view Totals for Stations and 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 **Station** or **Employee** radio button to select display data.

5. Click on **Hours**, **Cost**, and **Shifts** to display the related data for either Station or Employee.
   The number of hours/cost/shifts displays for each station or employee, each day, as well as a cumulative total.

# Viewing Totals for One Employee

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**.

# 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 update shifts for a particular Station and/or ShiftGroup, select the station or ShiftGroup, make the changes, and click **Update**.

10. 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.

11. Once Shifts are selected, click **Selected > Clear Breaks**.
    Prompt displays: Clear breaks from selected shifts?

12. Click **OK**.

# Adding Break Settings

Use Break Settings to establish settings that you can incorporate automatically into a shift in a template. This gives you control over when employees can take a break, for how long, and the kind of coverage you during the time employees are given a break.

**To add Break Settings:**

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

2. On the left navigation under the Tools folder, click **Break Settings**.
   Break Settings window displays in the right pane.

3. Use the drop-down lists to select the break size, i.e., amount of time a break will take, as well as when a break can start.

4. Select the minimum shift length to establish eligibility to take a break as well as the minimum buffer, i.e., the amount of time employees needs to work before they can take a break.

5. Select the minimum headcount percentage to ensure your stations are covered when employees are taking a break. Shifts are automatically adjusted based on the break size to ensure this coverage.

6. Select the minimum headcount of employees who must be at their stations at all times.

7. Click **Save**.

## 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**.
    **Note:** Shifts that are deleted from a template cannot be recovered. You must build a new template.
    **Warning:** If you delete the entire template, all information is lost.

# Forecasts

## Forecasts Section Overview

Use the Forecasts section to help you determine the shifts needed to meet your headcount.. You can filter information by day and station, as well as by client if you are using the Client Management Module.

*   To quickly build a Headcount Plan and use it to develop a template and a schedule, see Building a Headcount Plan and Building an Optimized Template.

*   To gain more information about forecasts and explore how you might use data feeds and time-series data to build plans in your organization, contact ScheduleSource Support. See Opening a New Support Case.

## Building a Headcount Plan

Use Forecasts to enter the Headcount Plan for your location. Once a Headcount Plan is setup, it can be used as the basis for a template. There are several steps involved in building a Headcount Plan and using it in a template:

*   Building a Headcount Plan

*   Building an Optimized Template- from a Headcount Plan

Refer to the following How To's.

**To build a Headcount Plan:**

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

2. On the left navigation under Forecasts Local Plans [Add] click on **Add**.
   Add Staff Plan window displays in the right pane.

3. On the Add Staff Plan window, select the **Type**: **Generic (7-Day)** or Date Based.
   **Note:** You can only use a Date Based plan on the exact day you select. However, you can use a Generic (7-Day) plan anytime. Therefore, when building Headcount Plans to be used in templates, we recommend using a Generic (7-Day) type.

4. Type the **Name** of the plan.

5. Select the **Interval** using the drop-down list. It is either 1 hour, a half hour, or fifteen minutes expressed as .50 or .25.

6. Select the **Display Range**. This is the time period the plan covers.

7. Click **Save**.
   Edit Plan window displays with Setup highlighted. Links for Totals, Details, and Optimize also display.

8. Click the **Details** link and then Details [**Add**].
   Heads...window displays with the title of your Headcount Plan.

9. Select the **Shift** range using the drop-down list. This is the number of hours you would like each shift to be scheduled for, i.e., 1.0 - 8.0 hours.

10. Select the **Station** for the Headcount Plan.

11. Select the Days this Headcount Plan covers.

12. Enter the number of employees needed during each timeslot, i.e., 1, 2, 3, and so on.
    **Note:** Since you selected an interval on the Add Staff Plan window, you do not need to enter headcount for the time the shift ends. For example, you designate one employee scheduled at 9. Since it is a one-hour interval and you close at 10, your plan covers from 9 - 10.

13. Click **Save**. Click the Close & Refresh List link.

14. To view, click the **Details** link at the top of the right pane.
    Detailed view of shift personnel required at that station displays with total hours on the far right.

**To build an Optimized Template:**

1. Select the Headcount Plan you want to publish. If you have just created the Headcount Plan, it already displays.

2. Click the **Optimize** link at the top of the window.
   Create Optimized Template displays.

3. On the Create Optimized Template window, type the **New Template Name**.
   **Note:** You may also include the shifts of a base template if desired. They will be added to the shifts in this Headcount Plan.

4. Click **Execute**. This action creates a template.
Optimizer window displays results.
**Note:** Once the Template is built, you can use it to create a schedule in your location.

# Chapter 6 – 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 one or all locations, and build a survey to distribute to employees using the feedback loop.

**Note:** To build a survey, your role permissions must be enabled for both Full and Feedback Administrator.

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 create a global profile as well as one for each location. In addition, use this section to delete a Notification you have created. Included are:

- Adding a Notification Profile — add a notification profile to your account.

- Deleting a Notification Profile — delete a notification profile.

Refer to the following How To's.

**To add a Notification Profile:**

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 one or more 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 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.

**Note:** To gather survey feedback, you need to have both Full access and Feedback Administrator role permissions.

- 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 7 – 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 Report Resources.

- 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.

| Reporting Field Design<br>Tally Function | Calculated Field Design<br>Statistical Function |
|---|---|
| Locations Report for Name, City, and State | Locations Report for Counting Locations in a State |

| Name | City | State |
|---|---|---|
| L1 | Denver | CO |
| L2 | Golden | CO |
| L3 | Westminster | CO |
| L4 | Wichita | KS |
| L5 | New York | NY |

| State | Count |
|---|---|
| CO | 3 |
| KS | 1 |
| NY | 1 |

# 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<br>Tally Fields | Calculated Field Design<br>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. See Opening a New Support Case.

# 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. |
| 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 |

| Option | Displays... |
|--------|-------------|
|        | 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}<br><br>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. | 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 <u>Column Formula Quick Reference</u> and go to <u>String Functions</u>.

# 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 in the Enterprise portal. See Adding Location Information.

| 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. |
| 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 in the Enterprise portal. See Stations Section Overview.

| 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. |
| Count | A count of the Stations, grouped by the other fields selected. |

# Station (Local)

Data available for each station deployed to location(s).

| 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. |
| 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 Enterprise portal: Admin > Custom Fields > Location. |
| 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. |
| 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 Enterprise portal: Admin > Custom Fields > Station. |
| ⚙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 Section Overview. 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 Adding Location Information.
- 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.*) |
| Address2 | Additional information for employee address. (*Entered in Address2 in the* |

| Field | Description of contents |
|---|---|
| | *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 |
| PhoneNo | Employee's phone number. *(Entered in Phone in Employee Information window.)* |

| 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. |
| 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 Enterprise portal: Admin > Custom Fields > Location. |
| 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. 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.

- 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. |
| LastName | Employee's last name. |
| Name | Name or type of the Availability Override. Report displays either Global Day |

| Field | Description of contents |
|---|---|
| | 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 Enterprise portal: Admin > Custom Fields >Employee. |
| 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. |
| ⚙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 Section Overview. 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 Adding Location Information.

| 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.*) |
| 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.*) |

| Field | Description of contents |
|---|---|
| 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. |
| 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 |

| Field | Description of contents |
|---|---|
| | 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. |
| UserDefined1 - UserDefined6 | Custom field(s) identified in Enterprise portal: Admin > Custom Fields > Employee. |
| 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 Section Overview. 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 Adding Location Information.

| 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 |
| 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.*) |

| Field | Description of contents |
|---|---|
| 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. |
| 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.*) |
| 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.*) |

| Field | Description of contents |
|---|---|
| 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.*) |
| 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). |

| Field | Description of contents |
|-------|-------------------------|
| 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 Enterprise portal: Admin > Custom Fields > Employee. |
| 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 Section Overview. 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 Adding Location Information.

- Accrual Type information is specified in Admin in the Enterprise portal.

| 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.*) |

| Field | Description of contents |
|---|---|
| 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) |
| 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* |

| Field | Description of contents |
|---|---|
| | *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 Enterprise portal: Admin > Custom Fields > Employee. |
| 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 Adding Location Information.

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

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

| Field | Description of contents |
|-------|------------------------|
| Active | A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window. |
| Address | Employee's street address. (*Entered in Address in the Employee Information window.*) |
| Address2 | Additional information for employee address. (*Entered in Address2 in the Employee Information window.*) |
| BioId | Employee's BioId. (*Entered in BioID in the Employee Information window.*) |
| BirthDate | Employee's birthdate. (*Entered in Birth Date in the Employee Information window.*) |
| CardId | Employee's CardId *(Entered in BadgeID in the Employee Information window.*) |
| City | City of the employee address. (*Entered in City in Employee Information window.*) |
| Country | Country of the employee address. (*Entered in Country in Employee Information window.*) |
| DefaultLocation | Indicates the location chosen as an employee's the primary work location in the Enterprise portal. To edit the DefaultLocation, go to Employees > Location and click on a Location in the list of locations for that employee. On the Locations Settings window that displays, select Yes or No for Default. |
| DefaultLocationExternalId | The External ID of the DefaultLocation. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates with an external system. |
| DefaultLocationId | Unique ID of the default location set by ScheduleSource. |
| Email | Email of the employee. (*Entered in Email in Employee Information window.*) |
| ExternalId | Employee ID for use with an external system, such as HR or Payroll. |
| FirstName | Employee first name. (*Entered in First Name in Employee Information window.*) |
| FullName | Employee full name. Displayed as "Last, First". |
| HireDate | Employee Start Date. |
| IVRPinCode | Employee's Pin number issued for clocking via a telephone. (*Entered in IVR Pin in Employee Information window.*) |

| Field | Description of contents |
|---|---|
| LastName | Employee's last name. (*Entered in Last Name in Employee Information window.*) |
| MaxDays | Maximum number of working days per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxDays. |
| MaxHours | Maximum number of hours per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHours. |
| MaxHoursPerDay | Maximum number of hours per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHoursPerDay. |
| MaxShiftsPerDay | Maximum number of shifts per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxShiftsPerDay. |
| MinHours | Minimum number of hours per week for this employee. Used only for reports and analysis. |
| Notes | Textual notes related to the Employee. (*Entered on Employee Information window.*) |
| OrgEmployeeId | Unique ID set by ScheduleSource. |
| PhoneNo | Employee's phone number. |
| PhoneNo2 | Additional employee phone number. (*Entered in Ph2 (cell) in Employee Information window.*) |
| PhoneNo3 | Additional employee phone number (*Entered in Ph3 (other) in Employee Information window.*) |
| PostalCode | Employee's zip code or postal code. |
| QualificationCode | Code associated with this qualification or certification. (*Entered in Name in the Qualification or Certification window.*) |
| QualificationCompletedBy | Date employee qualification must be completed by for an employee. (*Entered in the Assignments Credential window.*) |
| QualificationCompleted | Date employee completed the qualification or certification. (*Entered in the Assignments Credential window.*) |
| QualificationEffectiveEnd | Last date qualification is effective for an employee. (*Entered in the Assignments Credential window.*) |

| Field | Description of contents |
|---|---|
| QualificationEffectiveStart | Date qualification begins being effective for an employee. (*Entered in the Assignments Credential window.*) |
| QualificationEmployeeNote | Notes related to the qualification for an employee. (*Entered in the Assignments Credential window.*) |
| QualificationId | ID for the employee's qualification. *(Entered in Id in employee Assignments Credential window.)* |
| QualificationName | Name associated with this qualification or certification. (*Entered in Name in the Qualification or Certification window.*) |
| QualificationNote | Notes associated with this qualification or certification. *(Entered in Notes in the Qualification or Certification window.)* |
| QualificationStatus | Indicates qualification status: Complete = valid and Pending = pending |
| QualificationType | Set by ScheduleSource to distinguish qualification type: QUAL = Qualification, CLASS = Training, CERT = Certification |
| Rank | Rank of the employee versus other employees. Used in seniority considerations. (*Rank of the employee set in the Employee Information window in the Location portal under the Scheduling tab. To view the rank for an employee in the Location portal, select an employee and go to Edit Employee > Scheduling. In the Enterprise portal, go to Employees > Employees. Click the Scheduling tab. Rank displays in the table.*) |
| State | Employee's state (from Address settings). |
| TermDate | Termination or Inactive date of employee. (*Entered in Inactive Date in Employee Status window.*) |
| TimeZoneOffset | The hour difference between UTC time and the time zone setting for the employee. (*Selected under Employee Information > Time & Attendance.*) |
| TimeZoneUSDay | Indicates daylight savings for time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time. |
| UserDefined1 - UserDefined6 | Custom field(s) identified in Enterprise portal: Admin > Custom Fields > Employee. |
| 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 Section Overview. 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 Adding Location Information.

- Leave Types information is specified in Admin in the Enterprise 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.*) |
| 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. |
| 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. |

| Field | Description of contents |
|---|---|
| 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. |
| 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 |

| Field | Description of contents |
|---|---|
| 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 Enterprise portal: Admin > Custom Fields > Employee. |
| 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. |
| 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. They can be edited in the Location portal. See

In many organizations, schedulers assign employee skills in the Location portal. See Entering Employee Priority (Skill Level) and Using the Mass Update Skills Tool. You can also assign skills in the Enterprise 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.*) |
| 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 Enterprise portal: Admin > Custom Fields > Location. |
| 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. |
| 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. |

| Field | Description of contents |
|---|---|
| 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. |
| 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.*) |

| Field | Description of contents |
|---|---|
| UserDefined1 - UserDefined6 | Custom field(s) identified in Enterprise portal: Admin > Custom Fields > Employee. |
| 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 Section Overview. 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. In addition, once you establish a location, you set up Location settings, Employee accessl and swapping privileges, autofill and break settings, and time settings. See Setting Up Location Week Days and Special Days, Setting Up Admin Information for a Location, and Setting Up Admin Information for Privileges.

- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Chapter 5 How To's for Building and Managing Schedules. It inlcudes how to's for creating templates, schedules, shifts, and building a headcount plan.

**Note:** An Enterprise shift acts as a template unit when 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. |
| 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) |

| 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). (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) |
| 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 Enterprise portal: Admin > Custom Fields > Location. |

| Field | Description of contents |
|---|---|
| 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 |
| 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 Enterprise portal: Admin > Custom Fields > Station. |
| StationUserDefined1 - StationUserDefined6 | Same as "StationUDF" fields above. |

| 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).(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 Enterprise portal: Admin > Custom Fields > Employee. |
| 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. |
| 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) |

| Field | Description of contents |
|---|---|
| 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 Section Overview. 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. In addition, once you establish a location, you set up Location settings, Employee accessl and swapping privileges, autofill and break settings, and time settings. See Setting Up Location Week Days and Special Days, Setting Up Admin Information for a Location, and Setting Up Admin Information for Privileges.

- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Chapter 5 How To's for Building and Managing Schedules. It inlcudes how to's for creating templates, schedules, shifts, and building a headcount plan.

| 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 |

| Field | Description of contents |
|---|---|
| | 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. |
| 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). |

| Field | Description of contents |
|---|---|
| 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. |
| 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. |

| Field | Description of contents |
|---|---|
| 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. |
| 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. |

| Field | Description of contents |
|---|---|
| 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 Section Overview. 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. In addition, once you establish a location, you set up Location settings, Employee accessl and swapping privileges, autofill and break settings, and time settings. See Setting Up Location Week Days and Special Days, Setting Up Admin Information for a Location, and Setting Up Admin Information for Privileges.

- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Chapter 5 How To's for Building and Managing Schedules. It inlcudes how to's for creating templates, schedules, shifts, and building a headcount plan.

| 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. |
| 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. |

| 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). |
| 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. |
| 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. |

| Field | Description of contents |
|---|---|
| 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). |
| 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). |

| Field | Description of contents |
|---|---|
| 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 Section Overview. 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. In addition, once you establish a location, you set up Location settings, Employee accessl and swapping privileges, autofill and break settings, and time settings. See Setting Up Location Week Days and Special Days, Setting Up Admin Information for a Location, and Setting Up Admin Information for Privileges.

- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Chapter 5 How To's for Building and Managing Schedules. It inlcudes how to's for creating templates, schedules, shifts, and building a headcount plan.

| 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. |

| Field | Description of contents |
|---|---|
| FirstFullName | Full name of the FIRST employee the shift was assigned to. |
| 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 Enterprise portal: Admin > Custom Fields > Station. |
| 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. |

| Field | Description of contents |
|---|---|
| HoursMin | Hours of the shortest shift, grouped by the other fields selected. |
| HoursTotal | Sum of hours, grouped by the other fields selected. |
| 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 Section Overview. 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. In addition, once you establish a location, you set up Location settings, Employee accessl and swapping privileges, autofill and break settings, and time settings. See Setting Up Location Week Days and Special Days, Setting Up Admin Information for a Location, and Setting Up Admin Information for Privileges.

- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Chapter 5 How To's for Building and Managing Schedules. It inlcudes how to's for creating templates, schedules, shifts, and building a headcount plan.

| 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* |

| Field | Description of contents |
|---|---|
|  | *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). |
| 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. |

| Field | Description of contents |
|---|---|
| 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. |
| 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 Enterprise portal: Admin > Custom Fields > Location. |
| 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. |

| Field | Description of contents |
|---|---|
| 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 | 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 Enterprise portal: Admin > Custom Fields > Station. |

| Field | Description of contents |
|---|---|
| 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. |
| 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. |

| Field | Description of contents |
|---|---|
| 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. |
| UserDefined1 - UserDefined6 | Custom field(s) identified in Enterprise portal: Admin > Custom Fields > 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 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). |

| Field | Description of contents |
|---|---|
| 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. |
| 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. |
| 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 Section Overview and the how to's for creating templates 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.)* |

| Field | Description of contents |
|---|---|
| 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". |
| 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 |

| Field | Description of contents |
|---|---|
| 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. |
| 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. |

| Field | Description of contents |
|---|---|
| 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. |
| 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. |

# Index