

ScheduleSource: Release 2012.2 – Self Training Document

- The Release Note item is listed in Red. How to utilize the functionality is below each bullet.

Enterprise Portal

Application Enhancements

1. Local Schedules Section:

- Filter added: A Shift Group filter for the Shift Browser has been added.
- To Use: Open the Local Section/ Open the Options Tab.
- ✓ The default is [All Shift Groups].
 - ✓ ShiftGroups that have been created at the Location Level will appear in the new drop-down list.

Schedules

Menu Options

DATA

[Any Folder]

[Any Location]

[Any Employee]

[All Stations]

[All ShiftGroups]

[All ShiftGroups]

Afternoon

Evening

Manager

Morning

- ✓ Select the ShiftGroup you want to filter to. Click 'Apply'.
- ✓ Open the Menu Tab.
- ✓ Open the Shift Browser.
- ✓ The list of shifts is now filtered to the shifts that have been assigned to the ShiftGroup you selected.

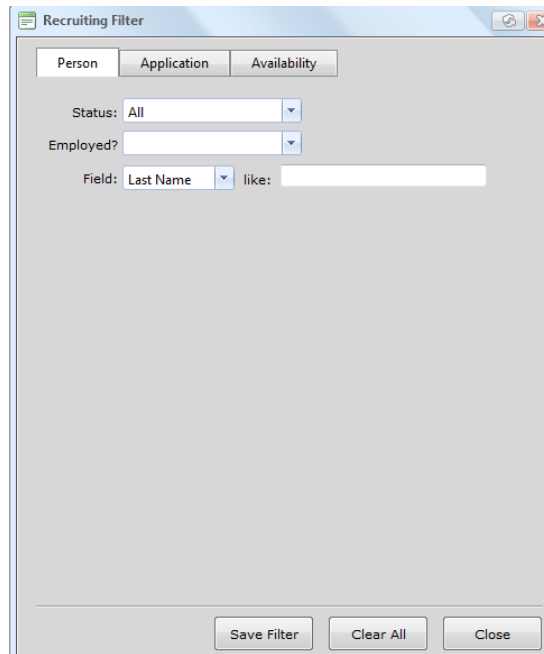
Schedules Print

Add Shifts

FILTER: Folder=; ShiftGroup=Afternoon;

2. Recruiting Section:

- The filter that is set when a user exits is now retained and set when the user logs in again to the recruiting portal.
- To Use: Open the Recruiting Section/Open the Filter setting pop-up



The Recruiting Filter dialog box has three tabs: Person, Application, and Availability. The Person tab is active. It contains the following fields:

- Status: All (dropdown)
- Employed?: (dropdown)
- Field: Last Name (dropdown) like: (text input)

At the bottom are three buttons: Save Filter, Clear All, and Close.

- ✓ Choose the filter you want. Click 'Save Filter'.
- ✓ At your next logon, this filter will be retained by the user name.
- **Availabilities: Added a new option to require application specific availability.**
- To Use: Open the Recruiting Section/Configuration/Choose Settings
 - ✓ Under Applicant Privileges, Choose 'Require for each application' to require application specific availability to be entered. Click 'Save'.

Settings

Setting	Value
Recruiting Site	http://ssi-test-1/QA-2012.2/Recruiting/?code=36840 Please use this url when linking to the recruiting site. The code in the url identifies your organization and it is required to establish that for the site to function.
Logo Url	<input type="text"/> If a url is provided for a logo, the logo will appear in the header of all Recruiting Site pages. The current logo is displayed below:
Settings	<p>Portal</p> <p><input type="checkbox"/> Require SSL (secure) connection</p> <p><input checked="" type="checkbox"/> Browse jobs/applications publicly (without registration)</p> <p>Applicant Privileges</p> <p>Applicant Availability</p> <p><input type="radio"/> Do Not Accept</p> <p><input type="radio"/> Accept</p> <p><input checked="" type="radio"/> Require</p> <p><input type="radio"/> Require for each application</p> <p><input checked="" type="checkbox"/> Allow Editing Application Forms (in 'Submitted' state)</p> <p><input checked="" type="checkbox"/> Allow Uploading Documents</p>

Save

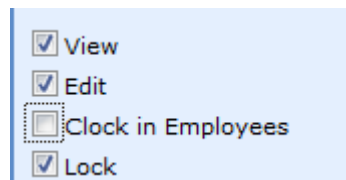
New Features

1. Roles Section – Location New Roles (default is set to off).

- **Time Section: New Role to allow scheduler to clock employee on or not. This role was separated out from the 'ability to edit clocking'. Now they are separate roles to assign.**

➤ To Use: Open the Roles Section

- ✓ Location Roles Folder
- ✓ Open a Role to open the Edit Role Information Screen.
- ✓ Open the Time section with list of time roles.
- ✓ Check the Box for 'Clock in Employees' to add this privilege to this role.
- ✓ Click on 'Save'.



- ✓ Note that the Edit privilege still allows a user to edit the time entries, but without the ability to clock an employee on.

2. Employee Section:

- **Manage Leave filter added: Clicking on the numbers in the grid will filter the list to that specific type of leave.**

➤ To Use: Open the Employees Section/Menu Tab.

- ✓ Open the Tools Folder.
- ✓ Open Manage Leave. The Leave list for the current month opens.
- ✓ Click on a number in the grid to filter the list to that specific type of leave.
Example: Granted Leave for Jan. 2012

Employees Print

Manage Leave

today 2012 Year

Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Requested:	1	0	0	0	1	1	0	1	0	0	0	0
Granted:	3	0	2	0	1	1	0	1	2	0	0	0
Denied:	1	0	0	0	0	0	0	0	0	0	0	0
Cancelled:	0	0	0	0	0	0	0	0	0	0	0	0

Filter: Granted Remove Filter

January, 2012 Month

Name	From	To	Days	Time(s)	Type	Comment	Conflicts	Hours	Status	Requested
H, John	Jan-02 (Mon)	Jan-02 (Mon)	1		Paid Time Off	Ok this time only	0	8.00	GRANTED	12/19/2011 09:03:41 AM
A, Abby	Jan-12 (Thu)	Jan-12 (Thu)	1		Paid Time Off		0	8.00	GRANTED	01/10/2012 03:20:29 PM
B, Dan	Jan-27 (Fri)	Jan-27 (Fri)	1		Vacation		0	8.00	GRANTED	01/13/2012 09:17:19 AM

- ✓ Note that it shows the filter applied above the monthly leave list.
- ✓ To see all types of leave for that month, Jan 2012, click on the 'Remove filter' link.