

ScheduleSource Self Train Document: Release 2014.2

Enterprise Portal

New Features

1. **Admin Section** – System Settings

- Configurable "Badge Number" field for Kiosk.

- ✚ Code to 'clock on' from the Kiosk can be configured to read from multiple fields as entered in the Employee Personal Information Tab.

- 1) Open Employee Section/ Open Employee Edit page.
- 2) Enter code in field desired to be used on the Kiosk.

Edit Employee Information

Personal Contact Scheduling

*Last Name:

*First Name:

Nickname:

Username/ID:

Password: [Chang](#)

Start Date:

Birth Date:

ExternalId:

IVR PIN:

BadgeID:

BioID:

- ✚ Can be set to read the ExternalId, Username/ID, BadgeID, BioId, or IVRPin.

- 1) Open Admin Section.
- 2) Open System Tab.
- 3) Choose field to be read for Kiosk code from drop down list.

Automatic Time Sheet Creation:

Kiosk Badge Field:

Custom Short Date Format:

Custom Time Format:

The Policy Management module must be used in order to use this feature.

Contact ScheduleSource if you are not currently using Policies to discuss the module being activated.

2. **Organization Section** - Policy/Time Settings Component

The Policy Management module must be used in order to operate this feature.

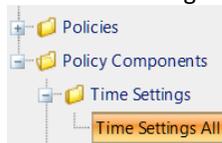
Contact ScheduleSource if you are not currently using Policies to discuss the module being activated.

- Option to select a sub-list of project/task/activity by station.
- Option to select default project/task/activity by station.

- ✦ This will limit the project/task/activity that an employee has available to clock on to by the *station* to which they are scheduled.
- ✦ This will affect all Locations.
- ✦ This will affect all employees assigned to the Time Setting component.
- ✦ This will be enforced for 'Clock On' *only when an employee is scheduled to a station*. It is not enforced if employees clock on when not scheduled.
- ✦ This will be enforced on 'Time Card' entries when the times overlap a shift. If not overlapping a shift, the full list of project/tasks will be available. If 'Allow card entry only when scheduled' is selected, the list is always enforced and employees will not be able to add entries on days/times without a shift. The [add] form will still open, but no projects and tasks will be available.

To Set Up

- 1) Open the Time Settings Component.



- 2) Check the Box to Select 'Use/Station/Time Settings'.

- ✓ Select the Effective Date. This is the first day the stations/time settings will be enforced on the clock and the card.
- ✓ Click Save.

- 3) For strict enforcement of the station project/task selections on card and clock:

- ✓ Set the 'Allow Card Entry' and 'Allow Clock Entry' to **ONLY** when scheduled.
- ✓ This will provide projects and tasks when the date/time of the entry overlaps a shift.

- ✓ If you choose to allow employees to 'always' make card entries, they will get the limited list when overlapping a shift and the full list when not overlapping.

- 4) Go to the Stations Section. Open the Station you want.

- ✓ A new tab for time appears in the Submenu. Click on the 'Time' Tab.



- ✓ Click the Selected button. Choose the Projects & Tasks/Activities you want for employees to have available to clock to when scheduled at this station.
- ✓ Choose the Default. Only the selected projects will appear as options.
- ✓ Click Save.

Example Manager Station:

Station Time & Attendance

These settings will limit the options on the Time Clock and Time Card, based on the employee's scheduled shift.

Changes in Employee 'Clock On' Options.

1) Example: Bob B

- Bob has time Default project/task set as an employee:

- Bob is scheduled in a location for Mon June 9th at two different stations :

	Start	End	Break Start	Break End	Station	Group	Employee	Note	Hours	
Date: Monday, June 09, 2014										
	8:45 AM	9:15 AM			Manager		B, Bob		0.50	<input type="checkbox"/>
	9:40 AM	4:00 PM			Lab Rm3	57234	B, Bob	Software Support	6.33	<input type="checkbox"/>

- ✚ The Manager Station has been restricted to clock on options of only Task 1 or Task 2 for project/task.
- ✚ The Lab Rm3 Station has not been restricted for clock on options.

- 1) Bob clocks on from employee portal, for the Manager shift at 8:39 am.

Time Clock

- Bob's default is Task 1 because that is the default set for Bob in the Employee/time default section and Task 1 is an allowed option for the Manager Station.
- Bob's can only clock Task 1 or Task 2 because they are the only allowed project/tasks to clock to as set for the Manager Station where he is scheduled.

Time Clock

Time: Jun. 9, 2014 8:41:23 AM

Status: OFF Clock Off

*Location: Location 1

*Project/Task: Regular Hours / Task 1

Activity: Regular Hours / Task 1
Regular Hours / Task 2

- 2) Bob clocks on from employee portal, for the Lab Rm3 shift at 9:22 am

Time Clock

Time: Jun. 9, 2014 9:22:04 AM

Status: OFF Clock Off

*Location: Location 1

*Project/Task: Regular Hours / Task 1

Notes:

- Rounding values when
- Signing out

AA Regular Hours II / Test 2
AA Regular Hours II / Test 1
Regular Hours / Task 1
Regular Hours / Task 2
Time off / Leave With Out Pay

- Bob can choose any project/task available to this location because the Lab Rm3 station has not been restricted to specific projects.

Changes in Employee 'Card Entry' Options. – Scheduled at Manager Station.

- 1) Employee makes a time card entry by clicking on the plan scheduled hours blue link, 1.25 for Monday June 9 where they are scheduled at the Manager Station.
 - ✓ The only project/task options are those allowed by the Manager Station where scheduled. They system knows that the time entry is for this station.

Time Card

		Sunday, June 08, 2014 - Saturday, June 14, 2014			
Location	Project	Task	Sunday Jun. 8, 2014	Monday Jun. 9, 2014	Tuesday Jun. 10, 2014
		Plan:	8am - 12pm 4.00	10:45am - 12pm 1.25	
		Plan Totals:	4.00	1.25	0.00
			[Add]	[Add]	[Add]
		Time Totals:			

Source: CARD

*Date: 6/9/2014

Schedule: 10:45 AM - 12:00 PM 1.25

*Times: 10:45 AM - 12:00 PM

Break Hours:

Calculated Hours: 1.25

*Location: Location 1

*Project/Task: Regular Hours / Task 1

Employee Notes: Regular Hours / Task 2

Alert Manager: No

* - Required Field Save Close

- 2) Employee makes a time card entry by clicking on the [add] time card is used.
- ✓ All projects/tasks in Location 1 are available as choices. The [add] link is not tied to a scheduled station.

[Add] 0.40

*Location: Location 1

*Project/Task: Regular Hours / Task 1

Employee Notes:

- AA Regular Hours II / Test 2
- AA Regular Hours II / Test 1
- Regular Hours / Task 1

Alert Manager:

- Regular Hours / Task 2
- * - R Time off / Leave With Out Pay

- ✓ Employees will not be able to use the [add] link if the time settings component is set to 'allow card entries only when scheduled.'