ScheduleSource Self Train Document: Release 2015.2

New Features   Helpdesk Support Tickets & Employee Portal Empty Shift Split Option

Helpdesk – Submitting Support Tickets

- We happy to announce we're migrating to a new help desk system. We expect this upgrade to enable faster response times, and better self-service access to our help materials.
    - If customers create an account within the help desk, they can access non-public materials and review ticket status for all open tickets.
    - New FAQs are published based on Frequently Asked Questions by customers.
    - View ScheduleSource Announcements & System Notices.
.
- Please note: by creating a ticket, the Helpdesk will setup an account for you.
    - You will receive an email to "confirm" your email address create a password. Please use the same email as you have as a User in TeamWork, and whatever password you like (systems are not synchronized and are hosted separately).
    - Once set up, you can log on to the Helpdesk.

- Our new Helpdesk and ticketing system is accessible three ways:
    1) online at http://helpdesk.schedulesource.com
    2) via email by sending a question to helpdesk@schedulesource.com
    3) from the main menu of the application (click the help link on the right)

Employee Portal - Empty Shift Split Option
- New Functionality
  - ➢ Employees can be allowed to split an Empty Shift that is on the Swapboard.
  - ➢ The new shift must pass all of the swapboard checks and will be immediately claimed by the employee if eligible to claim.
  - ➢ The unclaimed portion of the shift will remain on the swapboard.

Enterprise Portal:
- Enterprise/Admin/Settings – 'Show Open Shifts on Swap Board' must be set to **All** to allow empty shifts to go to the Swapboard in all locations.

Show Open Shifts on Swap Board: All
Only Swapped Shifts
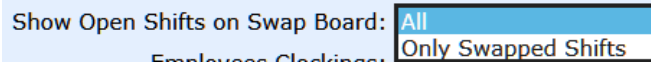
- Location Role: For Location User to see and enable, they must have privileges to the Admin section in the Location and to View Swapboard in the Schedule Section.

Admin Section: Admin (1/1)   ☑Admin

Schedule Section: ☑View Swapboard
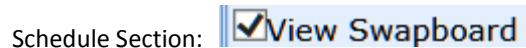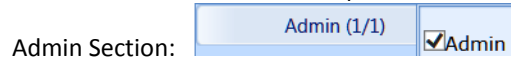
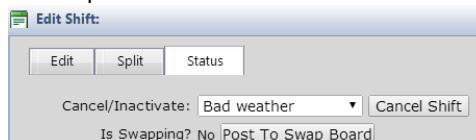- Requires no additional Enterprise Action – Controlled by each Location in the Admin Section.

Location Portal:
1. Swapboard
- Controlled by each Location in the Admin/Swap Board Rules settings.
  - ➢ Location Enables and sets Minimum Shift Length – the minimum minutes that a shift can be after it is split. (Employee drop-down list options are in 30 minute increments).
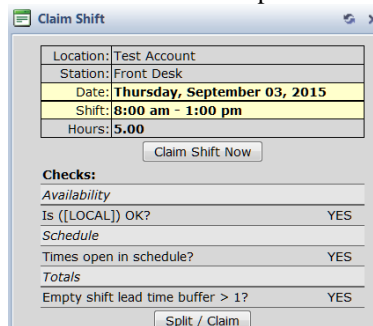
Allow Empty Shift Split? ☐   ❓
Minimum Shift Length (minutes): _____   ❓
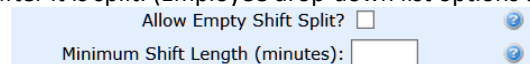
- This does not affect the Location Portal 'Post to Swapboard' functionality.
  - ➢ If a Schedule is posting an assigned shift to the swapboard for an employee, they will still use the Split tab to split the shift first which will create two new shifts on the schedule.
  - ➢ The 'Post to Swapboard' is then used on the one shift they want to post.

Edit Shift:
| Edit | Split | Status |

Cancel/Inactivate: Bad weather ▼ Cancel Shift
Is Swapping? No Post To Swap Board

Employee Portal:
- Split Empty Shifts
  - ➢ If Location enables, employee will see a Split/Claim button on the Claim Shift window.
  - ➢ Employee clicks [Check...] to open the **Claim Shift** window.

Claim Shift
Location:	Test Account
Station:	Front Desk
Date:	Thursday, September 03, 2015
Shift:	8:00 am - 1:00 pm
Hours:	5.00

Claim Shift Now

Checks:
Availability
| Is ([LOCAL]) OK? | YES |
Schedule
| Times open in schedule? | YES |
Totals
| Empty shift lead time buffer > 1? | YES |

Split / Claim

➢ Employee clicks the **Split/Claim** button.

> Split / Claim

➢ The **Split Shift** window opens, with the shift automatically being split in half (the same as when the employee splits their own assigned shift to put part on the swapboard).

Split Shift

Current Shift

Location:	Test Account
Station:	Front Desk
Date:	**Thursday, September 03, 2015**
Shift:	**8:00 AM - 1:00 PM**
Hours:	**5.00**

Split at: 10:30 AM ▼ - 1:00 PM ▼

| Shift #1: | 8:00 AM-10:30 AM | 2.5 | Check |
| shift #2: | 10:30 AM-1:00 PM | 2.5 | Check |

➢ Employee chooses time to split shift – drop down options are in 30 minute increments.
➢ Note that the Location had set a minimum shift length of 60 minutes so the times are limited to enforce that setting.

| Shift: | **8:00 AM - 1:00 PM** |
| Hours: | **5.00** |

Split at: 10:30 AM ▼ - 1:00 PM ▼

Shift #1:	9:00 AM	AM	2.5	Check
	9:30 AM			
shift #2:	10:00 AM	PM	2.5	Check
	10:30 AM			
	11:00 AM			
	11:30 AM			
	12:00 PM			

➢ Employee chooses which of the two shifts to try to claim by clicking **Check** button.

Split Shift

Current Shift

Location:	Test Account
Station:	Front Desk
Date:	**Thursday, September 03, 2015**
Shift:	**8:00 AM - 1:00 PM**
Hours:	**5.00**

Split at: 11:00 AM ▼ - 1:00 PM ▼

| Shift #1: | 8:00 AM-11:00 AM | 3 | Check |
| shift #2: | 11:00 AM-1:00 PM | 2 | Check |

➢ Employee clicks on the '**Claim Shift Now**' button if they want claim. All employee parameters are checked and employee can only claim if eligible just like on all swaps.

Split Shift

Date:	**Thursday, September 03, 2015**
Shift:	**8:00 AM - 1:00 PM**
Hours:	**5.00**

Split at: 11:00 AM ▼ - 1:00 PM ▼

| Shift #1: | 8:00 AM-11:00 AM | 3 | Check |
| shift #2: | 11:00 AM-1:00 PM | 2 | Check |

New Shift

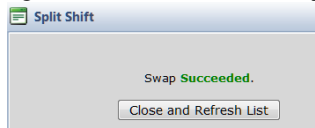| Station:	Front Desk
Date:	**Thursday, September 03, 2015**
Shift:	**8:00 am - 11:00 am**
Hours:	**3.00**

Claim Shift Now

Checks:

Availability

Is ([LOCAL]) OK? YES

Schedule

Times open in schedule? YES

Totals

Empty shift lead time buffer > 1? YES

➢ Employee gets a notification that Swap Succeeded.

➢ Employee clicks the '**Close and Refresh List'** button and the Shift is now assigned and shows on their Schedule.

My Schedule:

Location	Date	Station	Group	Client	Note	Start	End	Break	Hours	Actions
Location: Test Account										
Test Account	9/3/2015	Front Desk			fixed	8:00 AM	11:00 AM		3.00	[Swap...]
									3.00	