SCHEDULE SOURCE

275 Century Circle, STE 102, Louisville, CO 80027


ScheduleSource NEW REPORTS Self Train: Release 2014.3
New Features & Enhancements
Note: The bullets in blue match the bullet item list on the Release Notes pages.

Enterprise & Location Portal
  1. New Reports Section:

- The default will be the new reports section. (New Reports link has been available several months, but was not the default).
- Users can use link to go to the old reports section (which will be available only until Nov 4, 2014).
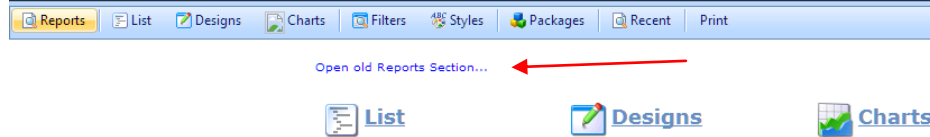
Functionality:

- All fixed reports in old section are still available. Nothing has been removed.
- Streamlined Design Report process with new columns and filters.
- Adds ability to email reports to users/locations on a schedule.
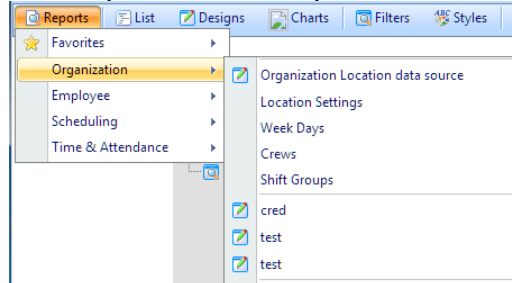- Adds four (4) New Data Sources.

New Features in Reports:
Navigation

- **Favorites List on start page, in Report toolbar.**
- **New List page for reports. Easier to find reports than left menu listing.**
  2 ways to see a list of reports.
    1) From drop down menu in Reports Tab:

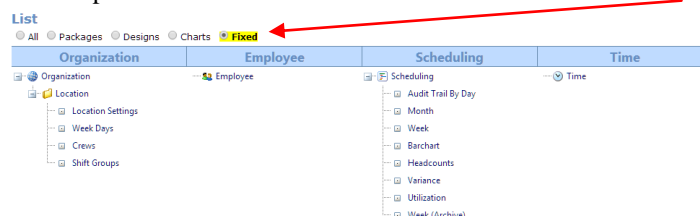   2) Open List from Report Toolbar:
      ➢ The Default is 'Design' reports by organization.
   ➢ The List of reports appears organized under the data base source used.

      ➢ Choose 'fixed' to see the list of reports created by Schedule Source that was in the old reports section.

- **"Recent" drop down - quick access to last 5 reports viewed.**
  1. Hover over 'Recent' in menu bar.
  2. A drop-down will show up to the last 5 reports viewed.
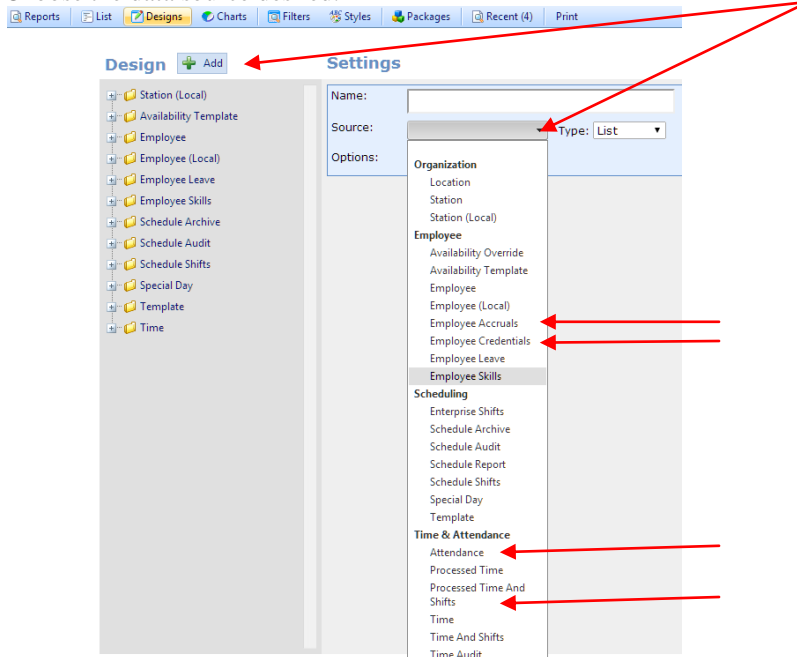 3. You can open the reports from this list.

Recent (4)	Prin
Schedule Month	
Audit by Day	
Days Closed	
cred	
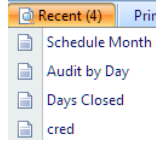
New Data Sources:

- ⬇ **Functionality:** For a list of column choices for reportable fields see Reports Section Help Documents on the TeamWork Learning Center. Two (2) new PDF's are posted.

TeamWork Learning Center

Home

HELP DOCUMENTS
Enterprise Portal
Location Portal
Enterprise & Location Reports

2014.3 Release Notes^new
2014.2 Release Notes
2014.1 Release Notes

Enterprise & Location

General:

1. Report Field Definitions (PDF)
2. Data Sources and Fields (PDF)
3. Column Formula Quick Reference (PDF)

- **Org Employee Credentials: Used with Credentials Module for reporting on qualifications.**
- **Accruals: Used to report accrual types and balances.**
- **Attendance: Used with Policies and attendance tracking.**
- **Processed Time and Scheduled Shifts: Used with Time Module. Allows reports across both data source of Processed Time (calculations for OT, Differentials, etc) and Scheduled Shifts.**

1. Open the Designs Section in menu bar.
2. Click on Add.
3. Click the down arrow on the Source box to view the list of data sources.
4. Choose the data source desired.

Reports | List | Designs | Charts | Filters | Styles | Packages | Recent (4) | Print

Design ➕ Add   **Settings**

- Station (Local)
- Availability Template
- Employee
- Employee (Local)
- Employee Leave
- Employee Skills
- Schedule Archive
- Schedule Audit
- Schedule Shifts
- Special Day
- Template
- Time

Name:

Source: Type: List ▼

Options:

Organization
  Location
  Station
  Station (Local)
Employee
  Availability Override
  Availability Template
  Employee
  Employee (Local)
  Employee Accruals
  Employee Credentials
  Employee Leave
  Employee Skills
Scheduling
  Enterprise Shifts
  Schedule Archive
  Schedule Audit
  Schedule Report
  Schedule Shifts
  Special Day
  Template
Time & Attendance
  Attendance
  Processed Time
  Processed Time And Shifts
  Time
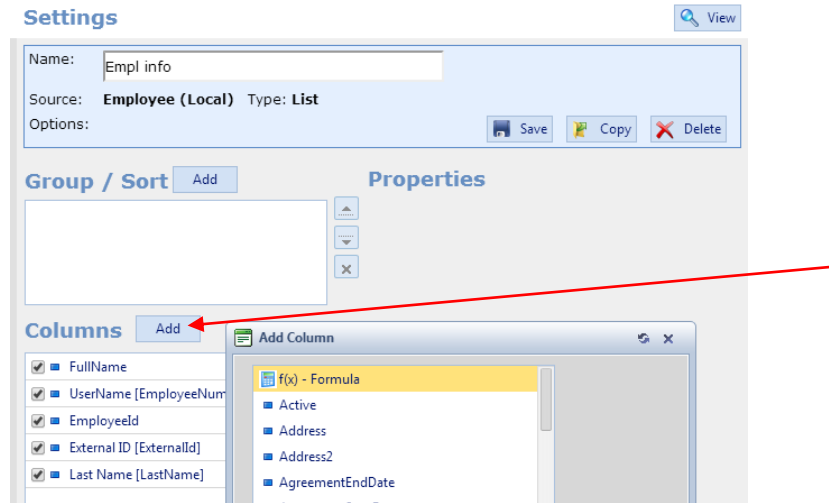 Time And Shifts
  Time Audit

New Design/Chart Editors includes
- **Multi-select columns when adding to report.**
  1. Open a Report that has been designed. The default is View.
  2. Open the Edit Section in top menu bar.


  3. Click on Add in Columns section to get the list of column choices to add to report.

  4. Hold down the CTRL key to Multi-select columns to add to the report.
  5. You can also multi-select columns when designing a new report with the Add link.

- **Single-click re-order of columns.**
  1. Open the report.
  2. In the Columns section, highlight the column you want to re-order. Click the up or down arrows to re-order the columns.
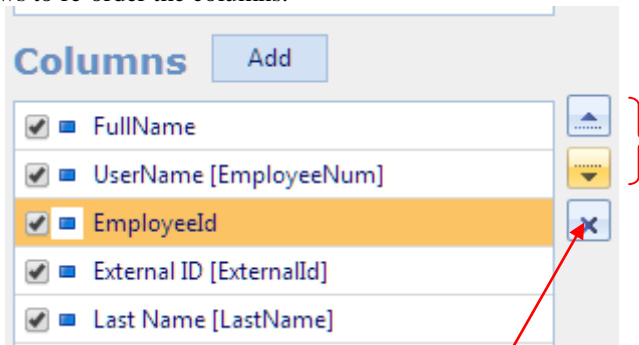
- **Single-click delete of columns.**
  ➢ Use the X to delete the column from the report.
- **Single-click hide/show column.**
  ➢ Uncheck the box in front of the column name to hide the column when the report is viewed. Example: The UserName will be hidden when the report is viewed.
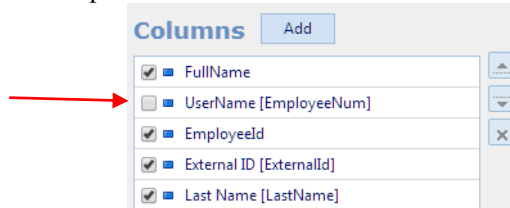
New Column Features

- Functionality: You use these features on the properties menu which will be displayed on the page when you click on the column name.
  - ➢ This note appears at the bottom of the columns list. `Select a column to view properties.`

- **Column Filters. Ability to filter on any field in report *and* save the filter with the report.**
  1. Open the report.
  2. Click on the column to view the properties menu.
     Ex: UserName column

  3. The Properties Menu will appear on the right for that column.

  4. Choose the filter from the drop-down list.
  5. Click Save to save the filter.

- **Formula Columns. A column with a user-defined function. Can read the data of other columns If included in report.**
  1. Go to the Tally Function Section on the property menu screen.
  2. Each function has a drop-down list of choices.
  3. Refer to the Report Help Document for writing formulas.

- **Hidden Columns. Columns can be included but not shown. Useful for having data available for formulas.**
 - ➢ Uncheck the box in front of the column name to hide the column when the report is viewed. Example: The UserName will be hidden when the report is viewed.

New Filter Editor
- Robust date filtering, either to relative date ranges or specific dates.
- Filter builder allows selecting field of interest before downloading data. Helps with performance for large enterprises.
- New filtering fields: Client(s), Labor Pools(s), Projects(s), Template(s), Schedule(s).

1. Open the Filters Section from top menu bar.
2. The Filter Menu will open.
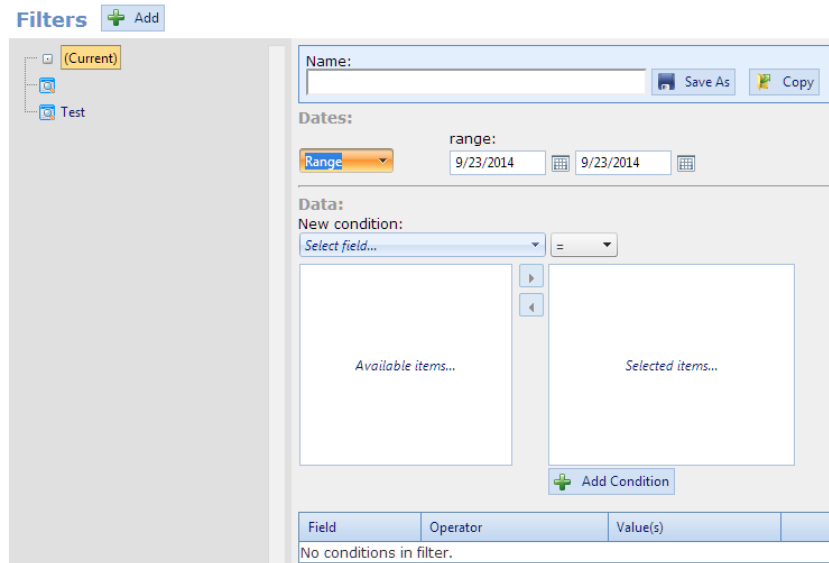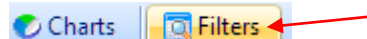
3. Use the filter drop-down lists for the new features above.

New Report Toolbar
- **Includes robust date-navigation in the toolbar.**
  1. From Lists menu, open report.
  2. Use date-navigation in report toolbar for date range or specific dates with forward and back green arrows.
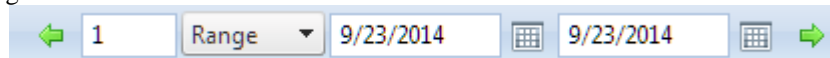
- **Links to pop-up Filter or Style selector, without navigating away from report.**
  1. From Lists menu, open report.
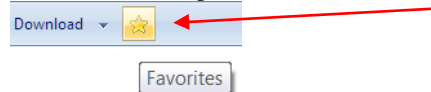 2. Click Filter in menu bar.
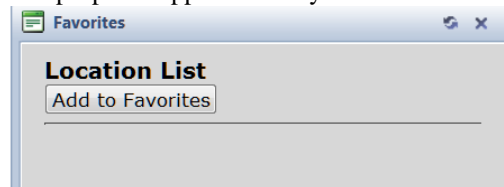
3. The 'Adjust Filter' menu will pop-up.
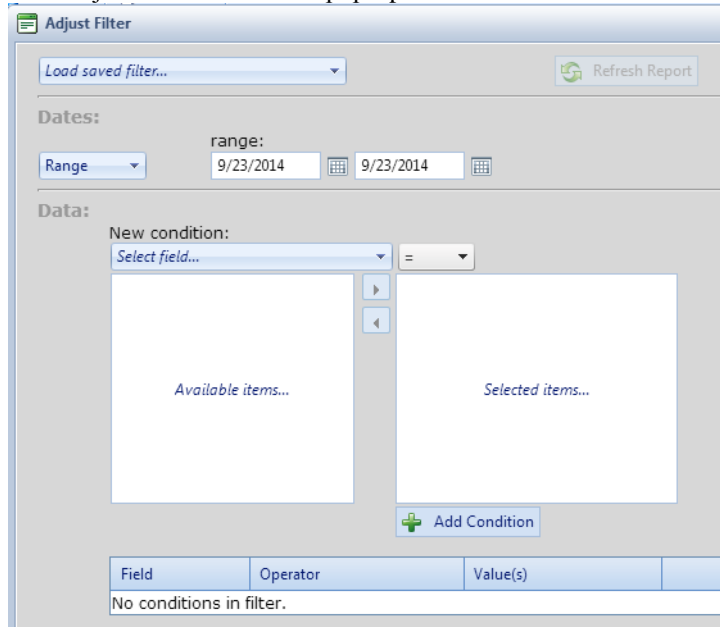
4. Adjust filters as desired.

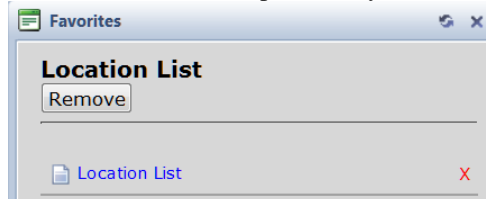- **Quick link to add report as favorite.**
    1. From Lists menu, open report.
    2. Click on the Star icon in report menu bar.

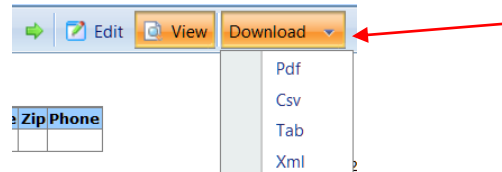   3. A Pop-up will appear where you can add the report to your favorite list.

    4. You can also delete a report from your favorite list by clicking on the red X.

- **Download Link.**
    1. Use Download to choose format to save data.

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Package Deliveries
- Set a schedule to send packaged reports via email.
- Add multiple subscribers from Enterprise or Location users.
- A special subscriber "Location" sends the report to the Location's email address.
- Schedules are time-zone aware. e.g. A 6 AM report will be sent to location users at 6 AM local time. (So Eastern is delivered an hour before Central, etc.).

Package Alerts
- A special type of delivery where the report is *only* sent if it contains data.
- Useful for EXCEPTION reporting.   The report must be designed to return zero rows under normal conditions, but include rows when exceptions occur. Example: Absent employees in last 15 minutes.
- Alerts can be run as frequently at every five minutes.

To use Report Packages please contact ScheduleSource for additional training.