

ScheduleSource ENTERPRISE Self Train Document: Release 2014.3 New Features & Enhancements

Note: The bullets in blue match the bullet item list on the Release Notes pages.

# Enterprise Portal:

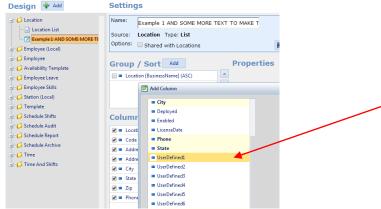
1. Location Section

- Time drop down menu:
  - > Moved Project and Activities to the Time section.
  - > Added a Shift Differential screen (for use with the Policy Module).
  - 1. New Location Menu bar with the new Time Drop Down List

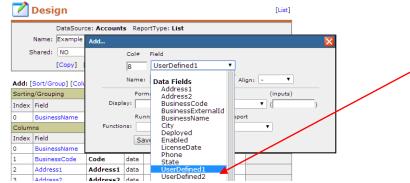
-	Locations	\ Location 1	l Print							
Ec	lit Settings for:	Location	n Employee	Schedule	Tim	e Assign:	Users	Station		
						Setup Time & I	Rules			
	Edit Location Information:					Default Project & Task				
						Valid IP Addresses				
	*Sign	In Code:	01			Projects				
	*Name: Location 1					Activities				
		Email:				Shift Differentia	ls			
		Addrogou			-					

## 2. Reports Section

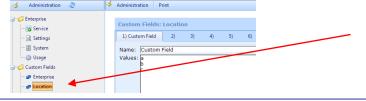
- Location report fields now include UDFs (Custom fields created).
  - 1. In the New Reports the Data Source 'Location' has User Defined Fields added as column choices.



2. In the Old report section: The Data Source 'Accounts' (Location information) has User Defined Fields added as column choices.



3. User Defined Fields are the 'Custom Fields' created in the Admin section for the Location.





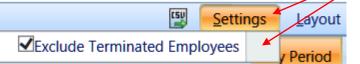
# 3. Collaboration/Feedback

- Added employee to Collaboration filter in Feedback Results Detail.
  - 1. Open a created survey.
  - 2. Open Results Detail Tab.
  - 3. Click on Filter link a new filter appears to filter by employee.

	Collaboration	Events	Messages	Notify	Feedbac	c Pi	rint				
Ô	Feedback	List Surveys	Add Survey	[Empl	loyee Revi	ew]	Results S	ummary 🛛	Results Detail		ld Result
	Employ	ee Revi			1/2014		- 9/30/	2014	App	ly	Total Su
			FI	LTER ()	Filt	er					
	Timestamp		Manager		Cur	ent Co	onditions				
					Fie			Operator			Value
					No	ecords t	to display				
					New	condit	ion:				
										- =	•
					En	ployee					Add
					20	14					

# 4. Time Module

- Ability to not include terminated employees in the payroll export.
  - 1. Pay Period Section: Open the Payroll page.
  - 2. Hover over 'Settings' in Top Menu.
  - 3. Check the box to 'Exclude Terminated Employees'.



- Absent/On page now includes column for Alert/Note/Clock Reason.
  - 1. Review Section: Open the absent/on page.
  - 2. New Column: Status



- Attendance Roll up does not include inactive employees by default.
  - 1. Reports: Open the Attendance Report
  - 2. An 'Employee Status' filter has been added. The default will be active. You can also choose Inactive or All from the drop-down filter list.



- Attendance Roll up filters can now be saved.
  - 1. Reports: Open the Attendance Report
  - 2. The filters in the blue shaded boxes apply only to this page. Set Filters.
    - Click Apply to view data.
    - Click Save to save the filter for the next time you return to this page.



Reports Roll Up Attendance Designs			
			Recent: Attendance   Roll
Attendance Roll Up Dates:	Preset One year	OCustom 9,	/22/2014
		HireDate: Status:	Employee Status:
		Confirmed/Or	Active
		FII	LTER () Apply Save
3. Reminder: FILT	ER ()		
This is th	e time Filter applie	es to All pages in the t	ime section.
	Time Filter		
	Employee: Lastname, Set Filt		[Clear]

## 5. Organization Section: Policies Module

- Ability to add a 'Default Policy' so that all employees will have a policy if a specific policy is not assigned to that employee.
  - **Functionality:** 
    - To use a default policy so that all employees have a policy for time calculations even if the first policy assignment is in the middle of the week.
    - The logic will now check for a policy assignment for the first day of the week, if it can't find one, it will check for the Default policy for that date. If none is found it will start scanning the employee assignments to the end of the week and pick the first one it finds.
    - If no one is found it will do the same for the default enterprise policy assignments. Only if all these steps fail, will the employee be without a policy for time calculations.
    - **u** The default policy applies to the whole enterprise and it is applied date-based.

#### 1. In the Tools folder, there is a new link to add a 'Default Policy'



- 2. Click on the link to open the right page.
- 3. Choose the Policy that you want for the default policy. The default will be used for any employee that has not been assigned a policy in the Employee/Agreement section.

Current: Policy		Start	End	Action	
	la ta diaplay	Start	LIN	Action	
vo record	ls to display.				
			•		
Assign: * <b>Policy:</b>	Policy 1		•		



• Ability to add 'Shift Differential Definitions' which can be defined per location.

# Functionality:

- 4 Allows user to define different shift differentials for different locations.
  - A location can also have no shift differential.

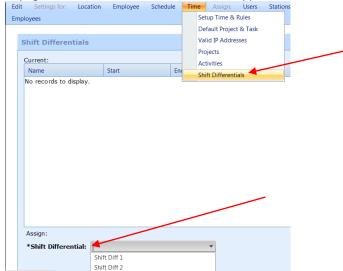
## To Use this feature:

- 1. In Organization Section:
  - a) Add a Policy component for Shift Differential or Edit an Existing Shift Differential.
  - b) On definition page check <u>both</u> checkboxes.

Shift Differentials

Turn on Shift Differentials
Use Location Shift Differential
Will fallback to this definition if no Shift Differential definition is configured on the location.

- c) If the 'Use Location Shift Differential' box <u>is</u> checked, the system will look at the differential that has been defined for the Location in the Location Section.
- d) If the 'Use Location Shift Differential' box <u>is not</u> checked, the system will use the shift differentials defined on this screen.
- e) Add as many different differentials as needed.
- 2. In Location Section
  - a) Open Location.
  - b) Choose 'Shift Differential' from the Time drop down list.
  - c) On the Edit page, choose the shift differential to be applied at this location.



- 3. Shift differentials are date-based in assignment, since if you would ever change them you would not be able to re-calculate older time data.
- Time Settings by Location in Policies: New option so users can now tell the policy to use the 'Time Settings' that have been defined in the Location section time settings page.
   Functionality:
  - This will enable existing customers to start using policies while still using the setting for different locations.
  - It will also enable customers that need to have different rules for different locations to make that work in conjunction with Policies.



### To Use this feature:

- 1. In Organization Section:
  - a) Add a Policy component for 'Time Settings Component' or Edit an Existing Time Setting component.
  - b) On definition page choose the <u>new option</u> to 'Use Location Time Setting'.

Time Settings Component	
*Name: Loc Time Set Versions: -	
LOCATION or POLICY  © Use Location Time Settings  Policy Time Settings	
	* - Required Field Save

- c) When selecting Locations settings, the settings for policy on this page get hidden as you will now choose the settings in the Location section.
- 2. In Location Section:
  - a) Open Location.
  - b) Choose 'Setup Time& Rules' from the Time drop down list.
  - c) On the Edit page, choose the criteria for time settings to be applied at this location.
  - d) Click Save.

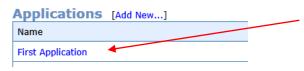
	Locations \	Location 1	Print						
it	Settings for:	Location	Employee	Schedule	Time	Assign:	Users	Stations	Employe
					Se	tup Time & I	Rules 🔫		
-	ettings \ Tin	ne <mark>\ Setu</mark>	p & Rules			fault Project			
						lid IP Addres	ses		
	GENERAL		_	_		ojects			
	Allow Employ					tivities			
			nge: -1 🗸 th		Sh	ift Differenti			
	Round tin	nes to near	rest: 6 💙 n	linute(s)			3		
	CLOCK vs.	SCHEDU	LE						
	А	llow Clock-	ON: Always		~		8		
	Early Cl	ock-ON buf	ffer: 10 🗸	minutes			0		
	Late Clo	ock-OFF buf	ffer: 10 🗸	minutes					
	Flag Clockin	ig as ERROI		ON is <u>early</u> OFF is <u>late</u> neduled			0		
	AUTO CLO	CK-OFF							
	Auto-	ClockOff Ty	ype: By Sche	dule 🗸					
		ClockOff Ho							
			ror: Error 🗸	1					
	Auto-Clo	ckOff Messa	age: auto clo	ck off					
	ADVANCE	D							
	-	lock hours]		hours,			0		
	Subt	tract a brea	ik of 0	hours from t	he total	time clock	ed		
			Sa	ve					

### 6. Recruiting Module

- Users can now copy Recruiting Applications.
  - 1. Go to Configuration in Menu Bar; Choose 'Applications'.

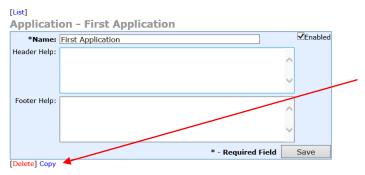


2. In the List of Applications, Click on the name of the Application to open it.





3. Click on Copy.



4. A pop-up will ask you to confirm making a copy. You can also give this application a new name.

Script Prompt	ОК
Copy this design?	Cancel
First Application - Copy	

- Upgrades to Recruiting portal filters.
- New Recruiting filter that allows users to easily find persons that have not filled out an application.
  - 1. People Section: Choose 'List' from the drop-down menu.

	People	Applications	
1	List		-
	Sumn	narv	
Click on Filter.			
	People FILTER (Sta	tus	
On the 'Recruit	ing Filter po	op-up', click do	own arrow in application box.
Choose 'No sub	mitted App	lications' from	n the drop-down list.
🛐 People 🛛 List	Summary Add		Recruiting Filter
People			Perron Application Application

	_	
_	L	Person Application Availability
mn		Application:
		All
Ci		Enabled Applications
h		No Submitted Applications
		First Application
	Ci	

5. Click Save Filter.

2.

3. 4.

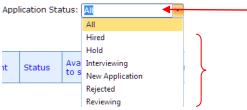
6. The List will automatically refresh showing only those people who have not submitted an application.

	eople TER (Status=N	lew Applicant;A	pplication=No s	Submitted Appl	ications;)			
Dr	ag a column he	lumn header and drop it here to group by that column						
				I				
	Last Name	First Name	Email Address	Street Address	City			
	Henson	Bob	h	h	h			

- Users can now change a Recruiting Person's Application status.
  - Functionality: You can now change the status of an <u>application</u>, in addition to being able to still change the status on a person.
  - 1. Open Application Section in menu bar.



- Open an Application from the drop-down list. 2.
- Open the Details Tab. 3. 😢 Recruiting People Applications Configuration Filter Print Application Summary Details 4 [First Application] Application Status: All -FILTER ()
- Open the 'Application Status' drop-down list. Choose the status. 4.



## 7. Credentials Module

- Add Credential column filtering to Expired & Expiring Credential pages. •
  - 1. Open Reports Folder.
  - 2. Open Expired or Expiring Credentials report.
  - 3. Filter on Credential column.

# **Expired Credentials** Employee Credential Y ×Y cor **Expired Credentials** Credential Employee Y Y CPR B, Bob

- New Location filter for Credentials.
  - 1. Open Reports Folder.
  - 2. Open Filter Folder.

4.

3. Click on the down arrow in the 'Select a Default Location' box.

	ilter						
	Select a Default Location	-					
Choose the location you want to filter to.							
Filter							
🖬	Location 1						
	Location 2						