SCHEDULESOURCE

275 Century Circle, STE 102, Louisville, CO 80027

ScheduleSource Self Train Document: Release 2014.1

Location Portal

Application Enhancements

1. Employee Section
   - Leave requests allow times to span midnight.

   + The entry above will create a 6 hr leave request for 1/31 9pm to 2/1 3am

   - Functionality:
     + The date range means "Taking leave each date in this range".
     + For entries with times (partial days off), the times off will be applied for *__each date in the range__*.

       So, if you have 1/31 – 1/31 and 8pm – 3am, the time off is:
       1/31 8pm to 2/1 3am

       If you enter 1/31 – 2/2 and 8pm – 3am, the times off are:
       1/31 8pm to 2/1 3am
       2/1 8pm to 2/2 3am
       2/2 8pm to 2/3 3am

       This approach mimics our shifts, where the shift has a single date and start/end times. If the shift spans midnight, it's still considered to be a shift on the date.

   - Sync Hours box (New).   This feature will update the Total Hours field when times are entered and vice versa.
     + If sync box checked:
       - Automatically calculate hours when you change times.
       - Automatically adjust times if you change hours.
       - Calculate hours for multi-day requests:
         o 8 hours per day *__if no times entered__*
         o TimeSpan * days if times are entered

     + If unchecked:
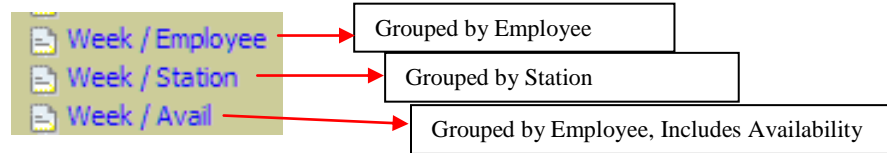   - Edit times, days, hours independently

2. Reports Section/Fixed Reports
   - Schedule Folder: Redesigned Fixed Week Report: Employee availability added

     ➤ Old Week report: 📄 Week   Old Report Name

- ➢ New Week Reports:
  - ✦ Employee Availability was added to this Scheduled Shifts week report.
  - ✦ The report has 3 different views each grouped by a data set.

- ✦ Each view can also be re-grouped by the other views, just as before.
- ✦ This report can now be used instead of Grid++ and Grid+++
- ✦ The Week/Availability is more accurate than the Grid+ reports – it includes Global Availability.
- ✦ The Grid++ and Grid+++ reports will be removed in a future release. Please let us know if the Week / Avail report provides the information you need.

- Added field choices for Start Time and End Time to EmployeeDaysOff Data source.
  - ✦ Allows sorting or grouping based on either start or end time. Same data as the "Time Off" data column choice (which has both times as one entry)

Result in Report:

SCHEDULE SOURCE

275 Century Circle, STE 102, Louisville, CO 80027

3. Schedule Section
    - Tools folder: Added note field to Swap Board page.
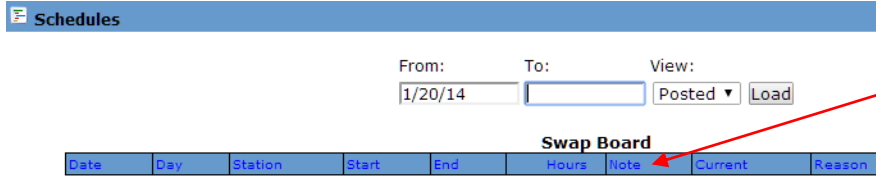
    - Tools folder: New Coverage Analysis report.

        + It gives the total headcount across multiple schedules for the same week.
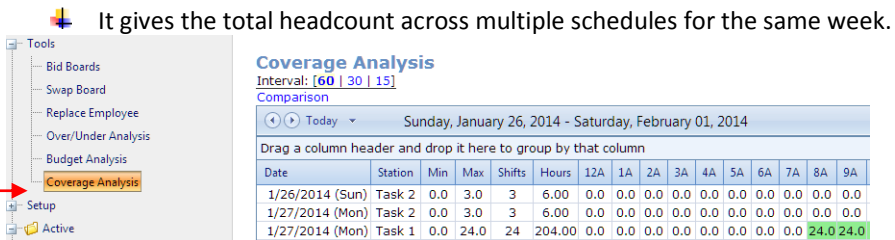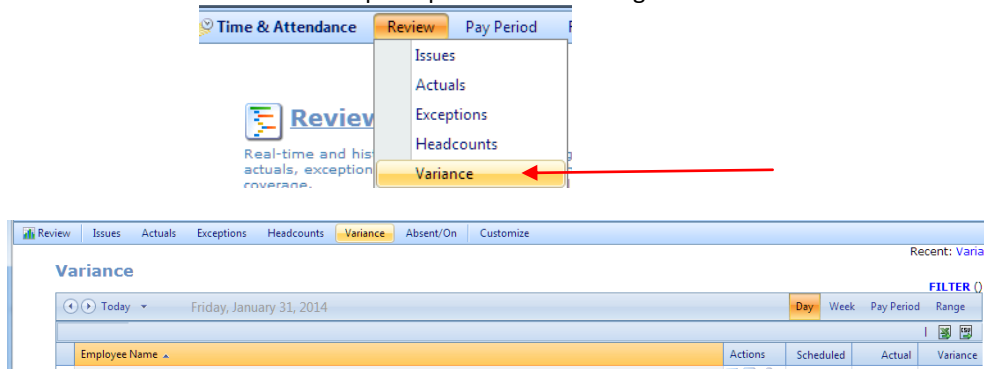

        + If only one weekly schedule is used, this will match the Coverage report that is on the week schedule tab.
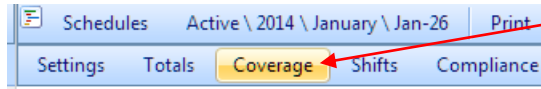
4. Time Section
    - Review Tab: Variance report splits shifts at midnight.

New Features

5. Employee Section
    - New field on Leave form: Sync Hours checkbox (see above #1).

6. Schedule Section
    - Schedule Totals page has split at midnight option.