

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

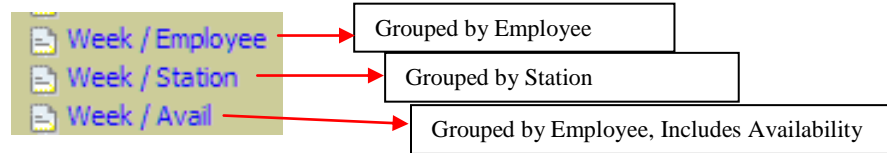
2. Reports Section/Fixed Reports

- Schedule Folder: Redesigned Fixed Week Report: Employee availability added

➤ Old Week report:  

➤ 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)

DataSource: **EmployeeDaysOff** ReportType: List
 Name: Empl Leave Type Save
 Shared: YES - Available at Locations
 [Copy] [Delete]

Add: [Sort/Group] [Columns] Add...

Index	Field	Col#	Field
15			StartTime

Columns:

Index	Field
0	FullName
1	LeaveTypeName
2	LeaveTypeId
3	LeaveTypeCode
4	LeaveHours
5	LastUpdatedDate
6	OffType

Field Selection Dialog:

Col#: 15 Field: StartTime

Name: LeaveTypeCode, LeaveTypeId, LeaveTypeName, LocationRequestTime, Notes, OffType, RequestStatus, RequestStatusText, RequestTime, StartMonth, StartYear

Display: [] Run: [] Functions: [] Save

Design

DataSource: **EmployeeDaysOff** ReportType: List
 Name: Empl Leave Type Save
 Shared: YES - Available at Locations
 [Copy] [Delete]

Add: [Sort/Group] [Columns] Add...

Index	Field	Col#	Field
16			EndTime

Columns:

Index	Field
0	FullName
1	LeaveTypeName
2	LeaveTypeId
3	LeaveTypeCode

Field Selection Dialog:

Col#: 16 Field: EndTime

Name: Days, DefaultLocationCode, DefaultLocationExternalId, DefaultLocationName, DefaultLocationPhone, EmployeeRequestTime, EnterpriseEmployeeId

Display: [] Run: [] Functions: [] Save

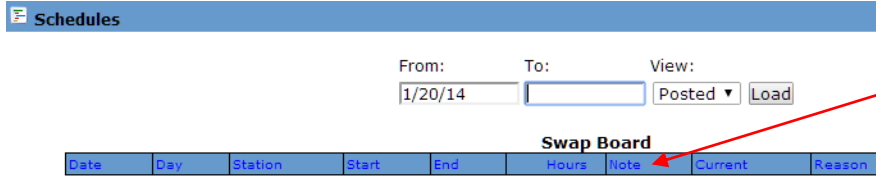
Result in Report:

Dates=(01/30/14 - 02/05/14) Demo SS Support

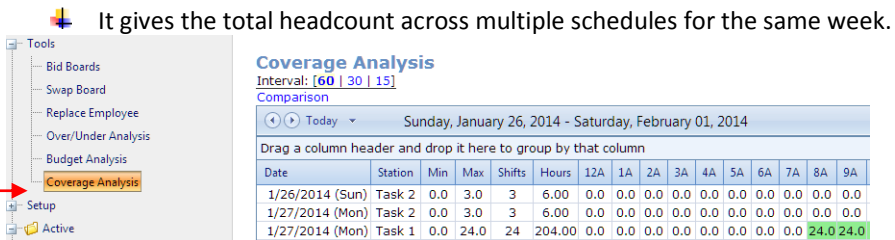
d	LeaveTypeCode	LeaveHours	LastUpdatedDate	OffType	TimeOff	RequestTime	DateStart	RequestStatus	Comment	Id	StartTime	EndTime
	test	9	1/28/2014 11:08:51 PM		8:00 AM-5:00 PM;	1/28/2014 6:56:39 AM	1/30/2014 12:00:00 AM	GRANTED		226157	08:00 AM	5:00 PM
	test	16	1/28/2014 11:09:45 PM		8:00 AM-4:00 PM;	1/28/2014 6:58:55 AM	2/3/2014 12:00:00 AM	GRANTED		226158	08:00 AM	4:00 PM

3. Schedule Section

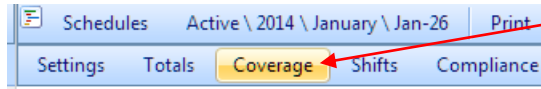
- Tools folder: Added note field to Swap Board page.



- Tools folder: New Coverage Analysis report.

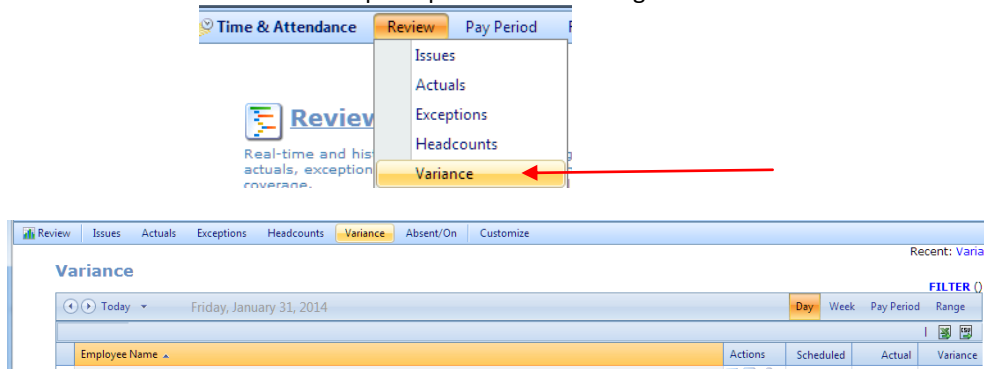


- If only one weekly schedule is used, this will match the Coverage report that is on the week schedule tab.



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.

