

ScheduleSource Self Train Document: Release 2014.1

Enterprise Portal

Application Enhancements

1. Employee Section:

- Leave requests allow times to span midnight.

The screenshot shows a dialog box titled "Add Leave Request". It contains several fields: "Employee" (dropdown menu with "A, Abby" selected), "Leave Type" (dropdown menu with "Test" selected), "Balance" (N/A Hours), "Start Date" (calendar icon, 1/31/2014), "End Date" (calendar icon, 1/31/2014), "Days in Range" (input field, 1), "Total Hours" (input field, 6.00), "Sync Hours" (checkbox, checked), "Times" (input field, 9:00 PM - 3:00 AM), and "Comment" (text area). A red arrow points to the "Sync Hours" checkbox. At the bottom, there are "Request" and "Close" buttons, and a note: "* - Required Field".

✚ 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. Report Section

- 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)

Design

✚ Result in Report:

Demo SS Support

Dates=(01/30/14 - 02/05/14)

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. Time Section

- Review Tab: Variance report splits shifts at midnight.

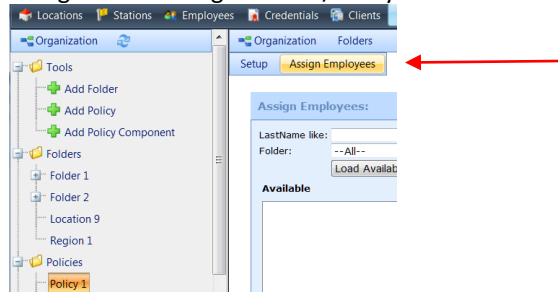
Enterprise Portal

New Features

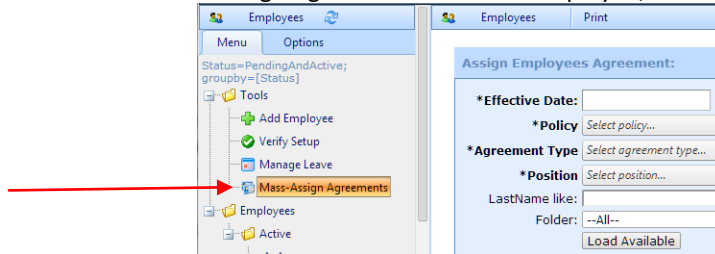
4. Organization Section

- Policies: The mass assign option for Policies has been removed; it has been replaced with a new Mass-Assign agreements menu in the Employee Section.
 - Note:** This allows the organization to assign a policy, agreement type, and/or position to new employees in the same assignment screen. Policies are still setup in Organization/Add Policy. Agreement types and positions are setup in Admin/Lists (see New Feature instructions below).

Old Mass Assign Policies. Organization/Policy – Removed tab to ‘Assign Employees’



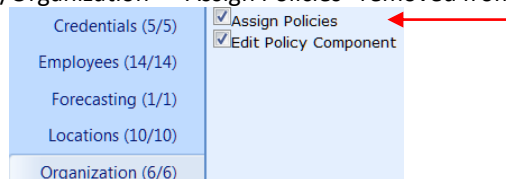
New Mass-Assign Agreements: Added. Employee/Tools folder (see below #6)



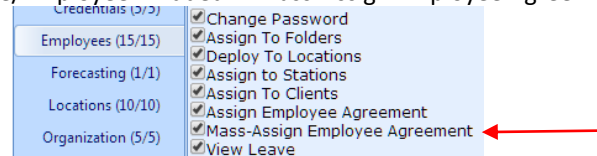
5. Roles Section

- Enterprise Role Change/Organization & Employee. The new role ‘Mass-Assign Employee Agreement’ replaces the old role option to Mass Assign policies.
 - Note:** If the User had the role ‘Assign Policies’ (previously under Organization), they will automatically be assigned the new role “Mass-Assign Employee Agreement” (under Employee). No action is required by the Enterprise Administrator.
 - This role will also allow them to assign employee Agreement Type and Position (if lists are created in the Enterprise/Admin section).

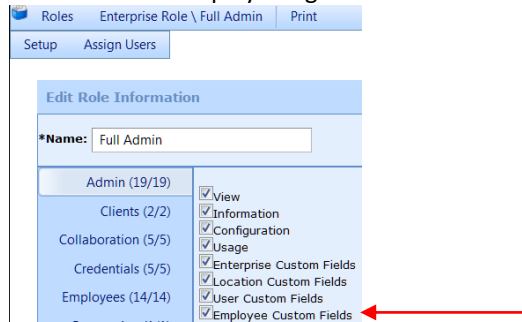
Old Role/Organization – “Assign Policies” removed from list.



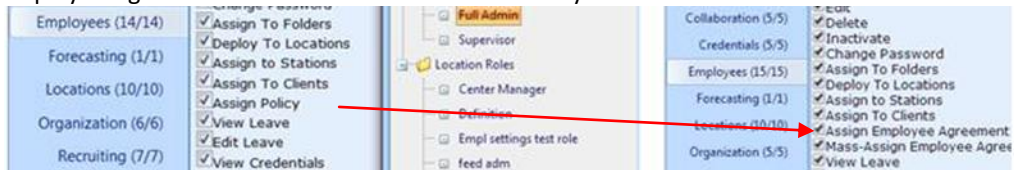
New Role/Employee – Added: “Mass-Assign Employee Agreement”



- Enterprise Role Change/Admin. The role 'Employee Custom Fields' now includes the ability to create lists for 'Employee Agreements' and 'Employee Positions'.

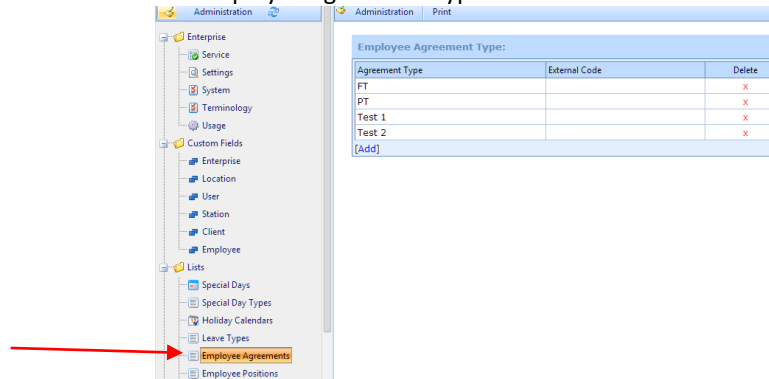


- Enterprise Role Name Change/Employee. 'Assign Policy' has been renamed 'Assign Employee Agreement'. If User has this role it will stay in effect.

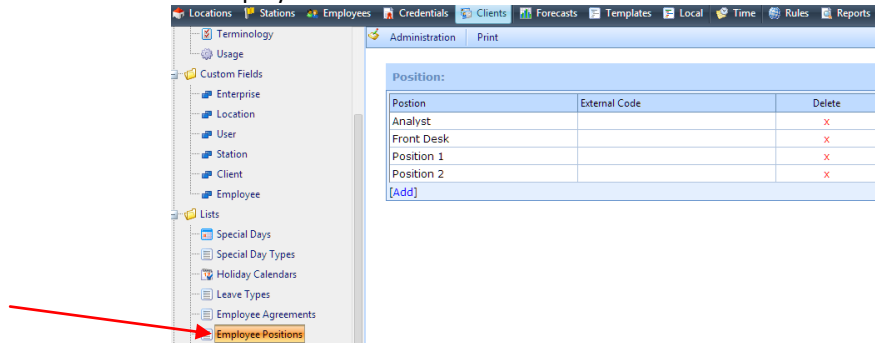


6. Admin Section

- Lists: Added employee agreement types



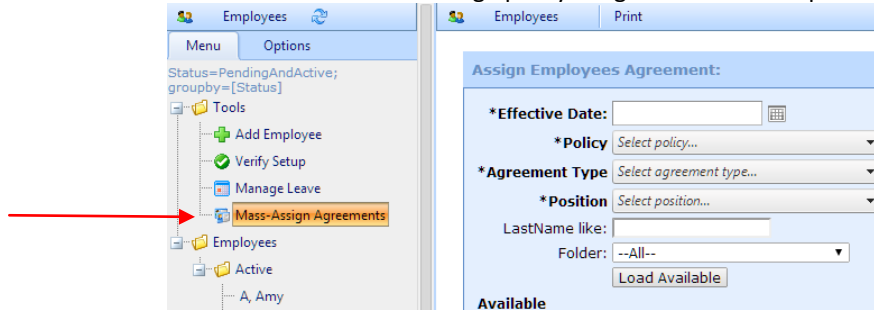
- Lists: Added Employee Positions



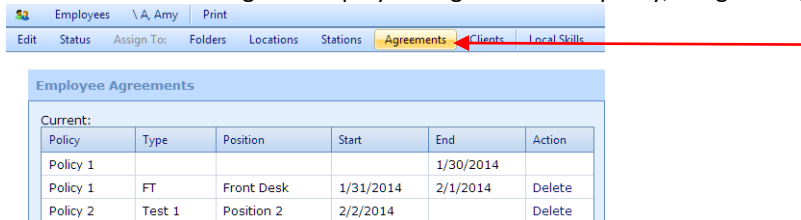
- Functionality:
 - Both are defined by organization.
 - List items cannot be edited.
 - List items cannot be deleted if in use (assigned to employees).

7. Employees Section

- Tools Folder: New Mass-Assign agreements link (Employee agreements is the new name for Employee Policy assignment).
 - ✚ To be used when employees are first assigned an agreement.
 - ✚ Cannot be used to change policy assignments for multiple employees.

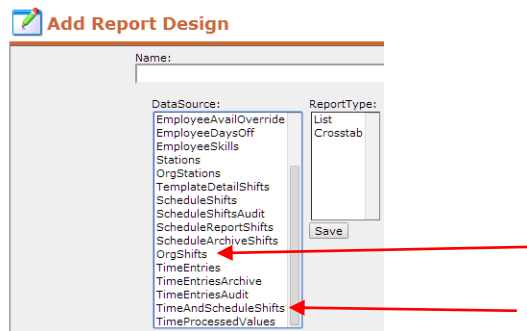


- Employee Menu Bar: New Agreement Tab
 - ✚ Used to Change an employee's agreement for policy, assignment, or position.



8. Report Section

- Two new data sources available for designing reports: Org Shifts, Time and Scheduled Shifts
 - Org Shifts – allows reporting data from Enterprise Schedules.
 - Time and Scheduled Shifts – allows a report with data from schedules and time.



- New Reports Section: Beta

New Features:

✚ Column Filters

Each column in a report design can contain a filter. These are applied *in addition to* the common filtering mechanism.

 **Formula Columns**

Calculate a new value based on other values in the report. Includes "if" statement logic.

 **Multi-Select Columns**

Build reports and charts faster!

 **Pop-Up Common Filter**

Manage the active filter with a pop-up and avoid navigating away from the report view.

 **Filter Builder**

Select and add criteria individually. Each criteria supports multiple values.

 **Package Distribution (Email Reports)**

Define a schedule and recipient list for a report package, and our system will generate and email the report automatically.

Please provide feedback to support@schedulesource.com on the Beta Reports section!